

SAN FRANCISCO PUBLIC LIBRARY



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San Francisco Public Library

Government Information Center
San Francisco Public Library
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San Francisco, CA 94102

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CLASS TITLE: LIBRARY PAGE

CODE: 3602

CHARACTERISTICS OF THE CLASS:

Under immediate supervision, performs simple clerical and light physical tasks in the main and branch libraries; and performs related duties as required.

Requires responsibility for: following simple directions, either oral or written; making routine contacts with the general public in connection with library services.

EXAMPLES OF DUTIES:

1. Picks up and returns books and periodicals or other material to proper departments; sorts books and returns to proper shelves; maintains proper order of volumes on shelves.

2. Transports books between various departments of the main library; delivers inter-departmental communications; locates and delivers books requested by library patrons.

3. Assists in packing books for mailing or discarding; numbers books, folds pockets, puts jackets on books, slips books and embosses covers.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires current attendance in high school. No experience required.

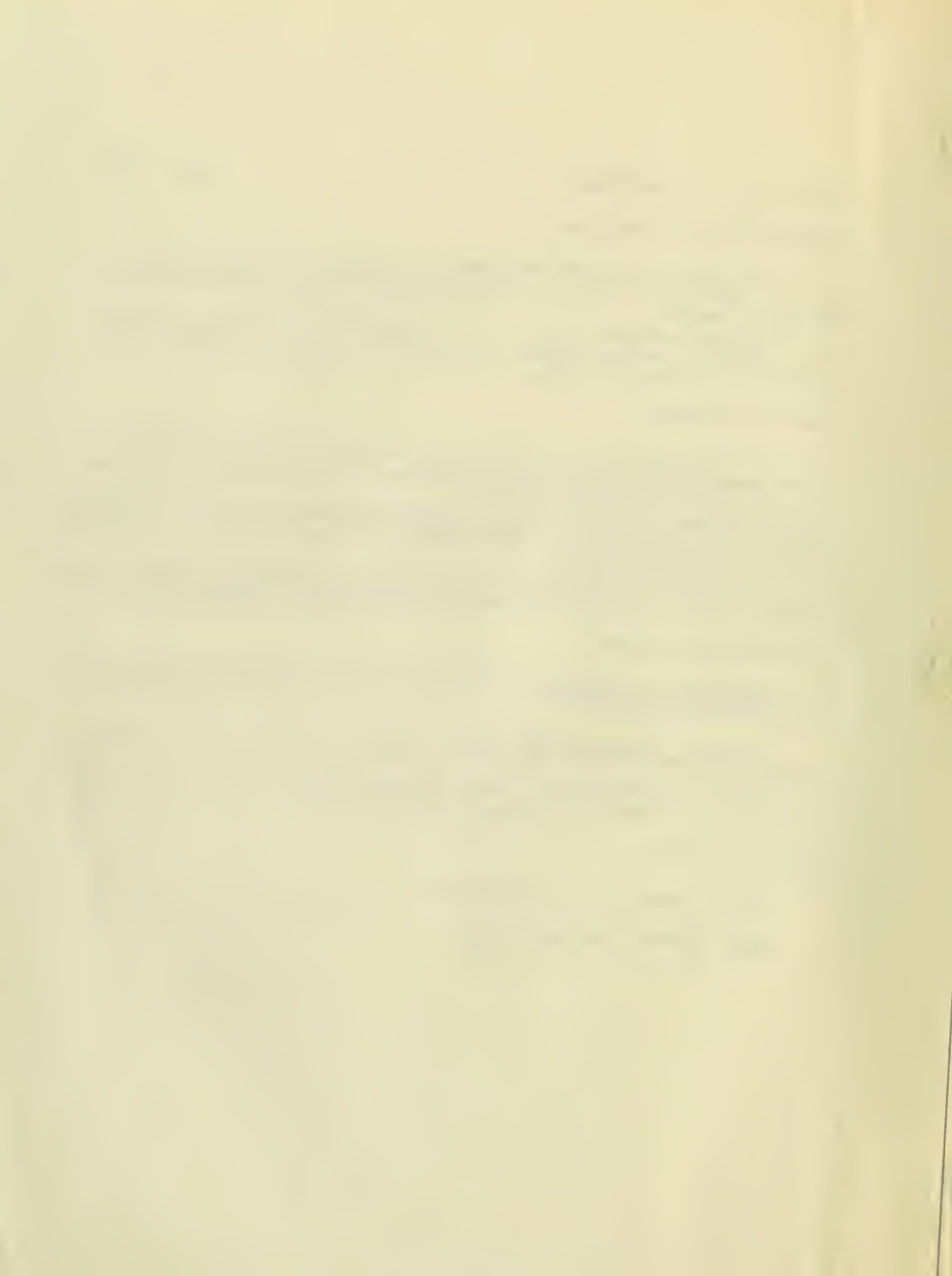
Knowledge, Abilities and Skills: Requires some knowledge of library systems.

Requires the ability to: serve the public in a courteous and efficient manner; follow directions and cooperate with others.

PROMOTIVE LINES:

To: No normal lines of promotion.

From: Exempt from examination.



CLASS TITLE: BOOK PROCESSOR

CODE: 3606

CHARACTERISTICS OF THE CLASS:

Under supervision, performs routine physical marking and preliminary processing of all books added to the library collection; and performs related duties as required. Requires responsibility for: making limited personal contacts; maintenance of simple records and exercise of limited judgment on routine matters. Nature of work requires occasional physical effort.

EXAMPLES OF DUTIES:

1. Types book pockets and plates for all book accessions and pastes into the inside cover of all books added to the library.
2. Inserts books in plastic dust jackets and delivers finished books to the appropriate department or branch.
3. Embosses the library seal on the covers of all books; writes call numbers on spines of books.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of high school; or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Requires ability to: rapidly learn book processing methods and procedures; perform simple typing and clerical tasks.

PROMOTIVE LINES:

To: Clerk
Clerk-Typist

From: Original entrance examination

CLASS TITLE: LIBRARY ASSISTANT

CODE: 3610

CHARACTERISTICS OF THE CLASS:

Under supervision, performs general and varied non-professional library work requiring basic training and aptitude; assists patrons in the use of library facilities; keeps simple library records; and performs related duties as required.

Requires normal responsibility for: following existing library methods and procedures; making routine contacts with the general public and other departmental personnel in connection with library operations; maintaining simple records of library operations.

EXAMPLES OF DUTIES:

1. Charges and discharges books, periodicals and other library materials.
2. Helps patrons to find and choose books.
3. Processes applications for library cards.
4. Answers routine questions on use of facilities and library procedures.
5. Receives and records fine payments for overdue, lost or damaged books.
6. Counts daily circulation and assists in compilation of monthly circulation report.
7. Types overdue notices, catalog cards, bibliographies, backlists, overdue record cards, borrower's register cards and daily cash report.
8. Maintains office files.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of high school; or an equivalent combination of training and experience.

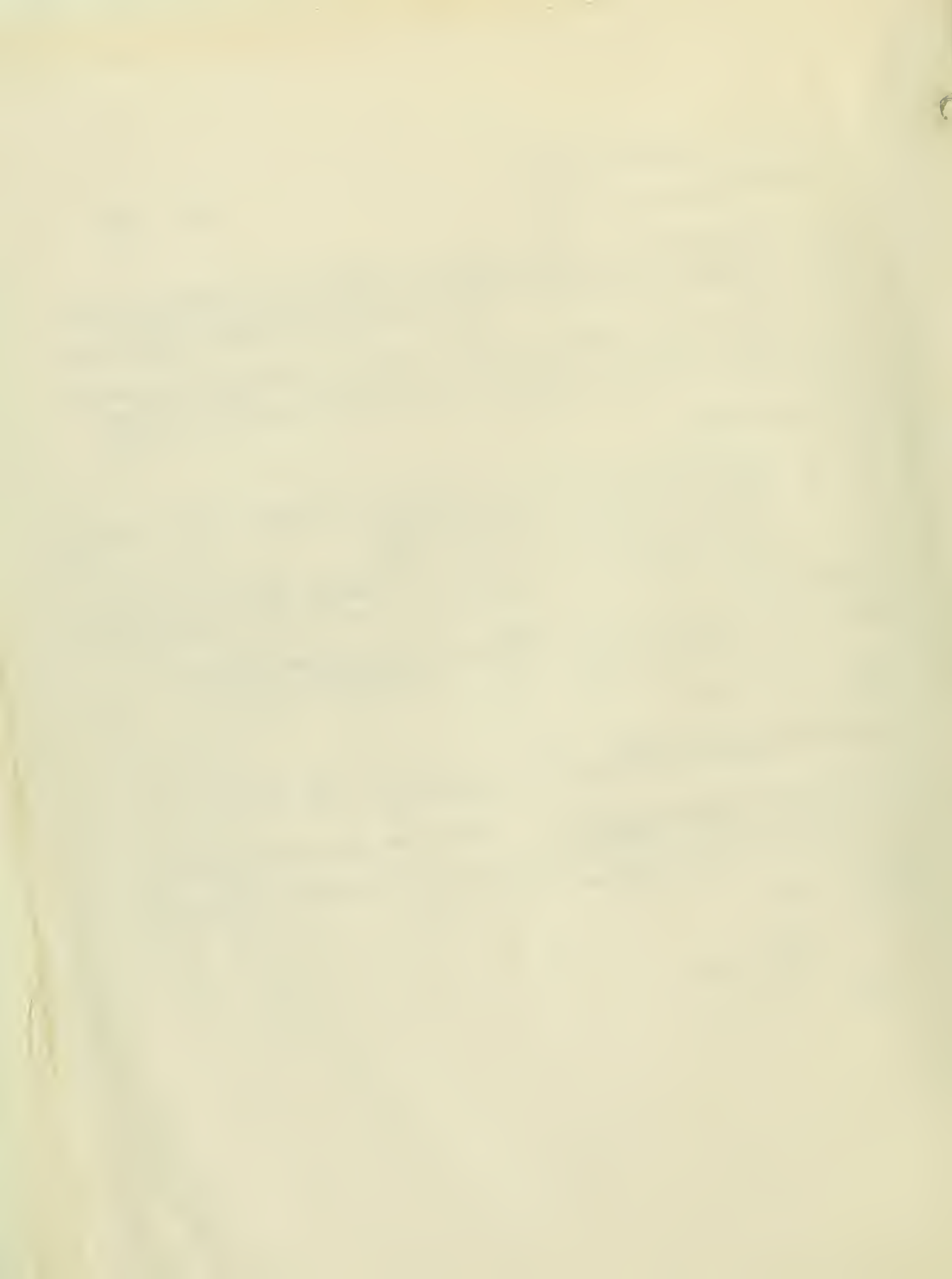
Knowledge, Abilities and Skills: Requires some knowledge of general office work and library operations.

Requires ability to: deal courteously and tactfully with the general public; perform simple typing and clerical tasks.

PROMOTIVE LINES:

To: Clerk
Clerk-Typist

From: Junior Clerk



SAN FRANCISCO CIVIL SERVICE COMMISSION

(NEW CLASS)

SECOND YEAR

CLASS TITLE: LIBRARY ASSISTANT (NEW CAREERS)

CODE: 3611

CHARACTERISTICS OF THE CLASS:

Under immediate supervision, performs general and varied nonprofessional library work requiring basic training and aptitude; assists patrons in the use of library facilities; acts as liaison between library and community; keeps simple library records; and performs related duties as required.

Requires normal responsibility for: Following existing library methods and procedures; making routine contacts with the general public and other departmental personnel in connection with library operations; maintaining simple records of library operations.

EXAMPLES OF DUTIES:

1. In a learning capacity, performs the more routine phases of 3616 Library Technical Assistant I duties, and does simple typing in carrying out these duties.
2. May distribute library publicity material in the community and provide potential library users with information relative to library services.
3. Encourages and promotes use of public library facilities by all members of the community by acting as liaison between community and library.
4. May answer questions in the community on the use of facilities and library procedures.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires successful completion of at least one year of full time paid experience as a New Careers employee consisting of on-the-job training and required college education in library technology; and must be within the category of those for whom the Economic Opportunity Act or other similar Federal or State legislation is intended to benefit.

Knowledge, Abilities and Skills: Requires some knowledge of library operations, and special innate knowledge of community being served.

Requires ability to: Deal courteously and tactfully with the general public; perform simple typing and clerical tasks.

PROMOTIVE LINES:

To: 3616 Library Technical Assistant I

ADOPTED: 3/3/69

(AMENDED)

CLASS TITLE: TECHNICAL INSTRUCTIONAL ASSISTANT, CITY COLLEGE LIBRARY

CODE: 3612

CHARACTERISTICS OF THE CLASS:

Under direction, performs difficult and varied subprofessional library work; assists faculty and students in the less complex assignments involving use of the library and its resources; instructs and supervises student assistants in routine library operations; maintains library records; and performs related duties as required.

Requires responsibility for: Carrying out, interpreting and enforcing adherence to established library rules and regulations; making regular, daily contacts with students, faculty, the public, industry, and other institutions in connection with library operations.

EXAMPLES OF DUTIES:

1. May be in charge of departmental areas of the library and may be assigned responsibility for a primary library function such as: Circulation, periodicals, or special library; instructs, coordinates the work of, and supervises students, clerical, and other assigned personnel.

2. Supervises accessioning and classifies pamphlets; assigns suggested book numbers to new books.

3. Uses bibliographic tools and orders Library of Congress cards, microfilms, periodicals, and other library materials.

4. Supervises book and stock inventories, and acts as custodian of supplies.

5. Checks catalogued and processed books, authority and subject authority files; submits orders subject to approval for library materials and processes periodicals for display and general circulation.

6. Interprets library rules, answers routine questions on the use of the City College Library and provides general reference service and assistance to students and faculty, the public, industry and other educational institutions.

7. Assists in discarding library materials and may design and arrange library exhibits.

8. May charge and discharge library materials.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of four years of college or university with a baccalaureate degree; or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Requires a good knowledge of: The general subprofessional level operations of the City College Library and the full range of those services required by faculty and students.

Requires ability to: Interpret the rules and regulations governing the library and its use; supervise and direct the work of others; keep records and prepare related reports; establish and maintain friendly and cooperative relations with students, faculty and other individuals and agencies using the library.

PROMOTIVE LINES:

To : No normal lines of promotion

From: Original entrance examination

ADOPTED: 8/26/65

AMENDED: 4/24/72

(NEW CLASS)

CLASS TITLE: LIBRARY TECHNICAL ASSISTANT I

CODE: 3616

CHARACTERISTICS OF THE CLASS:

Under supervision, and in accordance with well-defined policies and procedures, performs various routine phases of library work, including clerical duties, and performs related duties as required.

Requires normal responsibility for: Following established methods and procedures; making routine contacts with the general public, outside organizations, and library personnel in connection with library operations and activities; and preparing and/or maintaining various files and records.

EXAMPLES OF DUTIES:

1. Processes orders, overdue accounts, library card applications, requests for library material, new books, additional copies, McNaughton books, serials, documents, and other library material.

2. Charges and discharges library material.

3. Assists patrons in person, over the telephone and by correspondence regarding library policies, procedures and directional information; under supervision, assists patrons with routine questions and with the location of library material.

4. Searches for library materials; obtains information from shelflists, bibliographies, files, records and other sources.

5. Does preliminary cataloging; makes proper entry of new serials; assigns Cutter numbers; prepares catalog cards for reproduction.

6. Files; prepares and/or maintains various files and records; writes routine correspondence; types; receives and records money; sorts books and prepares them for delivery to branch, main library, or mailing, or for discard, or bindery.

7. Assists in opening and closing the branch or department and in keeping it orderly and pleasant; assists in inventorying the collection; assists in checking shelves for proper placement of books and for books in need of repair.

8. Instructs clerical and supportive staff and may supervise them.

9. May assist in preparing an exhibit, display or other publicity material; may drive bookmobile and assist librarian in serving bookmobile patrons.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires successful completion of two years of college with a certificate in library technology or two years of clerical experience in a library or an equivalent combination of education and experience.

Knowledge, Abilities and Skills: Requires a knowledge of library working procedures, reference aids and library terminology; general office procedures; and the role of a public library and/or school library in the community.

Requires the ability and skill to follow oral and written instructions, give attention to detail and accuracy, deal courteously and effectively with library patrons, and use common office equipment and machines. May require the ability to supervise.

PROMOTIVE LINES:

To : 3618 Library Technical Assistant II

From: Original entrance examination

ADOPTED: May 27, 1968



CLASS TITLE: LIBRARY TECHNICAL ASSISTANT II

CODE: 3618

CHARACTERISTICS OF THE CLASS:

Under supervision, and in accordance with established policies and procedures, performs various routine phases of library work, including clerical duties; exercises work direction over subordinate personnel; and performs related duties as required.

Requires responsibility for: Explaining and carrying out established methods and procedures; making regular contacts with the general public, outside organizations and library personnel in connection with library operations and activities; and preparing and/or maintaining various files and records.

The class of Library Technical Assistant II differs from Library Technical Assistant I in that this class may involve work direction over Library Technical Assistant I and subordinate personnel, contacts vendors and publishers, and may assist in revising the library catalog files.

EXAMPLES OF DUTIES:

1. Supervises subordinate personnel and coordinates their assignments to meet the needs of the department.
2. Processes orders, overdue accounts, library card applications, requests for library material, new books, additional copies, McNaughton books, serials, and other library material.
3. Assists patrons in person, over the telephone and by correspondence regarding library policies, procedures and directional information; under supervision, assists patrons with routine questions and with the location of library material.
4. Searches for library materials; obtains information from shelflists, bibliographies, files, records and other sources.
5. Does preliminary cataloging; makes proper entry of new serials; assigns Cutter numbers; prepares catalog cards for reproduction.
6. Files; assists in revising files; prepares and/or maintains various files and records; writes correspondence; types; receives and records money.
7. Writes or telephones vendors and publishers regarding invoices and claims; follows up on these communications as necessary.
8. Charges and discharges library material.
9. Assists in opening and closing the branch or department and in keeping it orderly and pleasant; assists in inventorying the collection; assists in checking shelves for proper placement of books and for books in need of repair.
10. May assist in preparing an exhibit, display or other publicity material.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires successful completion of two years of college with a certificate in Library Technology, plus two years of clerical or technical experience in a library.

Knowledge, Abilities and Skills: Requires a knowledge of library working procedures, reference aids and library terminology; general office procedures; and the role of a public library or a school library in the community.

Requires the ability and skill to follow oral and written instructions; give attention to detail and accuracy; deal courteously and effectively with library patrons; supervise and use common office equipment and machines.

PROMOTIVE LINES:

To : No normal lines of promotion

From: 3616 Library Technical Assistant I
Original entrance examination



SAN FRANCISCO CIVIL SERVICE COMMISSION

CLASS TITLE: LIBRARY MANAGER, ALICE STATLER LIBRARY

CODE: 3619

CHARACTERISTICS OF THE CLASS:

Under general supervision, performs librarian work for the Hotel and Restaurant library at the Community College campus; supervises the activities of sub-ordinate personnel and performs related duties as required.

DISTINGUISHING FEATURES:

This position is distinguished from Library Technical Assistant positions at the Community College campus in that the incumbent supervises the operation of a specialized and technical library of the Hotel and Restaurant Department. This position is responsible for selecting materials for the collection; supervising and directing students in the use of the library and performs reference work for the business community and for students and faculty in the Hotel and Restaurant field.

EXAMPLES OF DUTIES:

1. Supervises the operations of a special library of the hotel and restaurant department.
2. Recommends library materials to be purchased, repaired and discarded; may be responsible for the selection and maintenance of materials of a collection and suggests which materials shall be non-circulatory materials.
3. Supervises and reviews the activities of subordinate personnel and assists them in resolving questions and problems related to library activities; assists patrons in locating and using library facilities and materials; and selecting materials and answering a wide variety of questions.
4. Performs reference work for other libraries, industry and businesses; catalogs and classifies library materials; determine and assign main entry, subject headings and cross references and cataloging information for SPIRES, MARC and LC for maximum special collection usage.
5. Submit a budget request, determines how the monies are to be spent; maintains all the financial records of expenditures.
6. Write reports; answer all correspondence; plan and set up exhibits; maintains a pleasant and orderly atmosphere in the library, organizes the physical facilities, determines the lending or reference policies of the collection.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires a baccalaureate degree plus 3 years of progressively responsible clerical or technical experience in a library.

Knowledge, Abilities and Skills: Requires a good knowledge of library operations of the City College library and the full range of those services required by faculty, students and the community; knowledge of modern library procedures, reference aids and library terms; general office procedures.

Requires ability to deal courteously and effectively with students and faculty and outside organizations; evaluate a wide variety of library materials; advise and instruct library patrons in the use of the special library facilities and materials, locate information and materials; maintain files, records and prepare reports; ability to supervise subordinate personnel.

PROMOTIVE LINES:

TO: To be determined

FROM: Original entrance examination

ADOPTED: 12-5-77



SAN FRANCISCO CIVIL SERVICE COMMISSION

(Retitles and
amends)

CLASS TITLE: LIBRARIAN I

CODE: 3630

CHARACTERISTICS OF THE CLASS:

Under supervision, performs beginning level professional library work, and performs related duties as required.

Requires responsibility for: Explaining and carrying out assigned duties within the framework of established methods and procedures; making regular contacts with the general public, outside organizations and library personnel in connection with library activities and operations; maintaining a continued awareness of current reading trends and literature.

DISTINGUISHING FEATURES:

The class of Librarian I differs from Library Technician II in that this class is responsible for performing beginning level professional work such as making recommendations regarding the selection and maintenance of library materials in an assigned area; performing beginning level reference work; carrying out community programs to promote use of and interest in the library.

EXAMPLES OF DUTIES:

1. Assists patrons in locating and using library facilities and materials, in selecting materials, and in answering a wide variety of questions.
2. Recommends library materials to be purchased, repaired or discarded; may be responsible for the selection and maintenance of library materials of assigned section(s) of the collection and suggests which materials shall be noncirculating materials.)
3. Performs reference work; performs research; prepares detailed bibliographies, book lists and other information.
4. Plans and conducts children's, young adults', and adults' programs; meets with school principals; visits and works with various adult and community groups to promote the use of and interest in the library.
5. Catalogs and classifies library material; determines and assigns main entry, cross references and subject headings; (adapts Library of Congress cards for the library) and participates in determining cataloging policy.
6. Writes reports and correspondence; may supervise the maintenance and/or preparation of various files and records.
7. Plans or assists in planning and setting up displays and exhibits; assists in maintaining a pleasant and orderly atmosphere in the branch or department.
8. May supervise subordinate staff.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires possession of a Masters Degree from a library school accredited by the American Library Association, a certificate of librarianship, or a fifth year Bachelors Degree in librarianship from a library school accredited by the American Library Association.

Knowledge, Abilities and Skills: Requires knowledge of modern library methods, procedures and techniques, and knowledge of the role of a public library in the community.

CODE: 3630

CLASS TITLE: LIBRARIAN I

MINIMUM QUALIFICATIONS (contd)

Requires ability to deal courteously and effectively with library patrons and outside organizations; evaluate a wide variety of library materials; advise and instruct library patrons in the use of library facilities and materials; locate information and materials; maintain files, records and prepare reports; may require the ability to supervise.

PROMOTIVE LINES:

To : 3632 Librarian II

From: Original Entrance Examination

AMENDED: 8/11/69

(Retitled and
amended)

CLASS TITLE: LIBRARIAN II

CODE: 3632

CHARACTERISTICS OF THE CLASS:

Under general supervision, performs advanced professional librarian work; supervises the operations of a branch library or a department of the main library; supervises activities of subordinate personnel; may supervise the operations of a special library in another City and County department; and performs related duties as required.

Requires responsibility for: Interpreting, enforcing and carrying out assigned duties within the framework of established methods and procedures; making regular contacts with the general public, outside organizations and library personnel in connection with library activities and operations; and maintaining a continued awareness of current reading trends and literature.

DISTINGUISHING FEATURES:

The class of Librarian II differs from Librarian I in that this class supervises the operation of a small or medium sized branch, a department of the main library, a bookmobile, or a library in other City and County departments and has responsibility for selecting books for the operation supervised. This class is expected to perform the more difficult and extensive reference work; plan and conduct library programs to meet community needs; and may be assigned responsibility for a special project related to library work.

EXAMPLES OF DUTIES:

1. Supervises the operation of a small or medium-sized branch library, bookmobile, or department of the main library; assists in supervising the operation of a large branch library or department of the main library; may supervise the operation of libraries in the City Attorney's office or Public Utilities Commission.
2. Supervises and reviews the activities of subordinate personnel; assists subordinate personnel in resolving questions and problems related to library activities; may interview applicants for supportive positions.
3. Assists patrons in locating and using library facilities and materials, in selecting materials, and in answering a wide variety of questions.
4. Keeps collection, or part of the collection, current and useful by recommending or coordinating staff recommendations regarding library materials to be purchased, repaired or discarded; develops collection through personal knowledge of materials available; and recommends which materials shall be noncirculating.
5. Performs reference work, including that of a difficult nature and requiring extensive searching and analyzing; performs research; and prepares detailed bibliographies, book lists and other information.
6. Plans and conducts children's, young adults' and adults' programs; meets with school principals; visits and works with various adult and community groups to promote the use of and interest in the library; and may plan and carry out adult and community programs to meet community needs.
7. Catalogs and classifies library materials; determines and assigns main entry, subject heading and cross references; adapts Library of Congress cards for the library; supervises subordinate personnel; and participates in determining cataloging policy.

CLASS TITLE: LIBRARIAN II

CODE: 3632

EXAMPLES OF DUTIES (contd)

8. Orders library materials; writes correspondence regarding these orders; and assists in determining the best sources of supply.

9. Plans and sets up displays and exhibits; maintains a pleasant and orderly atmosphere in the branch or department.

10. Writes reports; supervises the maintenance and/or preparation of various files and records; may submit budget requests; and may work on special projects.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires a Masters Degree from a library school accredited by the American Library Association or, a certificate of librarianship, or a fifth year Bachelors Degree in librarianship from a library school accredited by the American Library Association, plus 2 years of progressively responsible library experience.

Knowledge, Abilities and Skills: Requires good knowledge of modern library methods, procedures and techniques; library materials; knowledge of the role of a special library and/or public library in the community.

Requires considerable ability to deal courteously and effectively with library patrons and outside organizations; evaluate a wide variety of library materials, advise and instruct others in the use of library facilities and materials; plan library programs and book selection to meet the needs of the community; prepare reports; and the ability to organize, supervise and delegate.

PROMOTIVE LINES:

To : 3634 Librarian III

From: 3630 Librarian I

Original entrance examination

AMENDED: 8/11/69

(Retitles and
Amends)

CLASS TITLE: LIBRARIAN III

CODE: 3634

CHARACTERISTICS OF THE CLASS:

Under direction, performs difficult and responsible librarian work; supervises the operation of a large branch library or department of the main library; supervises the activities of subordinate personnel; and performs related duties as required.

Requires responsibility for interpreting, enforcing and carrying out assigned duties within the framework of established library policy; making regular contact with the general public, outside organizations, and library personnel in connection with library activities and operations; and maintaining a continued awareness of current reading trends and literature.

DISTINGUISHING FEATURES:

The class of Librarian III differs from Librarian II in that this class supervises the operation of a large branch library or a department of the main library, and may also supervise a cluster of branch libraries. This class has responsibility for staff development, book selection in the area supervised; performing difficult, extensive and technical reference work; and exercising initiative, creativity and independent judgment in developing programs of community interest.

EXAMPLES OF DUTIES:

1. Supervises the operation of a large branch library or a department of the main library; may be responsible for the supervision of a cluster of branch libraries.
2. Supervises and reviews the activities of subordinate personnel; assists subordinate personnel in resolving questions and problems related to library activities; interviews applicants for supportive positions.
3. Assists patrons in locating and using library facilities and materials; in selecting materials; and in answering a wide variety of questions.
4. Keeps branch or department collection current and useful by recommending or coordinating staff recommendations of library materials to be purchased, repaired or discarded; develops collection through personal knowledge of materials available; may act as a consultant in a special field.
5. Performs reference work, including that of a difficult and technical nature and requiring extensive searching and analyzing; performs research; prepares detailed bibliographies, book lists and other information.
6. Plans and carries out adult and community programs to meet community needs; visits and works with various adult and community groups to promote use of and interest in the library.
7. Supervises the processing and cataloging or ordering of library material and the activities of the personnel in these departments; determines best sources of supply for library material.
8. Plans and sets up displays and exhibits; maintains a pleasant and orderly atmosphere in the branch or department.
9. Writes reports; supervises the maintenance and/or preparation of various files and records; submits budget requests; may work on special projects.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires a Masters Degree from a library school accredited by the American Library Association, or a certificate of librarianship, or a Fifth year Bachelors Degree in librarianship from a library school accredited by the American Library Association, and four years of progressively responsible professional library experience, including at least two years of supervisory experience.

CLASS TITLE: LIBRARIAN III

CODE: 3634

MINIMUM QUALIFICATIONS (contd)

Knowledge, Abilities and Skills: Requires considerable knowledge of: Modern library methods, procedures and techniques; library materials; knowledge of the role of the public library in the community.

Requires considerable ability to deal courteously and effectively with library patrons and outside organizations; evaluate a wide variety of library material; advise and instruct others in the use of library materials and facilities; plan library programs and book selection to meet the needs of the community; speak and write effectively; prepare reports; and the ability to organize, supervise, coordinate and delegate.

PROMOTIVE LINES:

To : 3638 Chief Librarian
3640 Coordinator, Children's Library Activities
3642 Coordinator, Adult Library Services

From: 3632 Librarian II

AMENDED: 8/11/69

CITY AND COUNTY OF SAN FRANCISCO
DEPARTMENT OF HUMAN RESOURCES

DOCUMENTS DEPT.

SEP 30 1998

SAN FRANCISCO
PUBLIC LIBRARY

CLASS TITLE: LIBRARIAN IV

CODE: 3636

DEFINITION:

Under general administrative direction performs difficult and responsible managerial level librarian work in the direction of major library functions in one or more areas of Branch Library Services, Main Library Services, Children's Services, Technical Services, Automation or Community Relations.

Major responsibilities include: overall direct management responsibility for assigned functional area; developing administrative policies; performing administrative and managerial work pertaining to division assignment; acting as Assistant City Librarian as required; making regular important contacts with the general public and outside organizations relative to operations and activities of assigned area of responsibility; preparing wide variety of operational records and reports pertaining to library activities; preparing and managing operating budget for assigned area of responsibility. Functional areas of responsibility include: Reference and Resources, Branch Libraries, Children and Youth, Collections and Automation, Collection Management and Community Relations.

DISTINGUISHING FEATURES:

The Librarian IV differs from Librarian III in that this class manages the direction of major library functions in one or more areas of branch library services, main library services, children's services, technical services, automation or community relations. This class has overall direct management responsibility for assigned functional area.

SUPERVISION EXERCISED:

Provides general and technical direction to subordinate personnel in assigned areas of responsibility; plans, assigns and directs the work of subordinate professional and para-professional staff engaged in public service and related activities. This class has day-to-day supervisory and management responsibility for the functional areas assigned.

EXAMPLES OF IMPORTANT AND ESSENTIAL DUTIES:

"The class specification shall be descriptive of the class and shall not be considered as a restriction on the assignment of duties not specifically listed." (CSC Rule 9.3.2)

1. Assists in development of administrative policies and procedures related to area of responsibility.

2. Participates in selection and placement of personnel.
3. Plans and directs activities of assigned area of responsibility
4. Plans and executes changes in organization, methods and procedures for improved public service.
5. Coordinates unit functions with other library units
6. Prepares and directs the preparation of correspondence, records and reports pertaining to activities and operations of assigned area of responsibility.
7. Advises library personnel on difficult problems and questions and interprets regulations and policy matters.
8. Performs related duties and responsibilities in functional area, as assigned.

JOB RELATED AND ESSENTIAL QUALIFICATIONS:

Knowledge of: Principles and practices of librarianship, library methods, procedures and techniques, particularly as applied to the assigned functional area; principles and practices of administration and management of a modern library, including providing service through automated, on-line systems.

Ability to: Plan, assign and direct the activities of subordinate professional and para-professional library personnel; speak and write effectively; deal effectively with library users and outside organizations; evaluate library materials and operations appropriate to functional area of assignment; maintain records and prepare operational reports; prepare and manage a budget; and use on-line systems.

Experience and Training guidelines: Any combination of training and experience that could likely provide the required knowledge and abilities may be qualifying. A typical way to obtain this would be:

Training: Requires completion of a 4 year college or university with a baccalaureate degree, and the possession of a Master's of Library Science, or Library Information Science degree from a school accredited by the American Library Association.

Experience: Requires at least six (6) years of progressively responsible professional library experience, preferably in a large urban library in the functional area of responsibility; three (3) years of which must include responsible supervisory experience.

Effective Date: August 14, 1998

CLASS TITLE: CHIEF LIBRARIAN
(BRANCH LIBRARY SERVICES)
(CENTRAL LIBRARY SERVICES)
(TECHNICAL SERVICES)

CODE: 3638

CHARACTERISTICS OF THE CLASS:

Under general administrative direction, performs difficult and responsible professional librarian and administrative work in the direction of one or more of the major library functions as identified in the title; plans, assigns and directs the activities of subordinate professional personnel engaged in such work; and performs related duties as required.

Requires major responsibility for: assisting in developing administrative policies and procedures in connection with library activities and operations; making regular important contacts with the general public and outside organizations relative to library operations and activities; preparation and maintenance of a wide variety of important operational records and reports reflecting library activities.

EXAMPLES OF DUTIES:

Branch Library Services: Supervises and directs the activities of all branch library bookmobile operations and branch departments; makes periodic inspections and visits to the various branches and units to assure adequate conditions of physical plants and library collections and library services are in keeping with existing policies and procedures; recommends possible use in other library units; advises branch library personnel on difficult problems and questions and interprets regulations and policy matters as conditions require; prepares and directs the preparation and maintenance of all records and reports relative to branch library functions.

Central Library Services: Plans and directs the activities of the circulation or reference units of the main library; provides and directs subordinates in providing a variety of services to library patrons including explaining resources of the library, the use of reference and bibliographic tools for locating specific information and recommending books to read on special interest subjects; plans, recommends and executes changes in organization, methods and procedures for improvement of efficiency and service to the public; coordinates unit functions with those of other library units; utilizes a variety of library resources in providing professional book services to readers, including card catalogs, books and pamphlet shelves in special areas, indexes, services and printed bibliographies and reference books in general and special fields; instructs subordinates and patrons in the use of reference tools and related materials; prepares and directs the preparation of correspondence and records and reports pertaining to the unit's activities and operations.

CLASS TITLE: CHIEF LIBRARIAN (continued)
(BRANCH LIBRARY SERVICES)
(CENTRAL LIBRARY SERVICES)
(TECHNICAL SERVICES)

CODE: 3638

Technical Services: Plans, assigns and directs technical library services in connection with selecting, ordering and purchasing books and other library materials; checks and reviews the activities of subordinate personnel to assure prescribed schedules of book ordering and receipts are properly maintained; provides assistance and advice to branch librarians on problems relating to book ordering and purchasing; checks book reviews, trade magazines, publisher catalogs and circulars in connection with the selection and purchase of library books and to assure acquisition of such books in the earliest possible time; establishes budgets and programing for book purchases; receives and interviews book salesmen and conducts correspondence relative to the purchase of new books.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of a four year college or university, with a baccalaureate degree, supplemented by completion of a prescribed course in library science in a library school accredited by the american library association.

Requires at least six years of progressively responsible professional library experience, preferably in the appropriate specialty, including at least three years of responsible supervisory experience; or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Requires comprehensive knowledge of: library methods, procedures and techniques, particularly as applied to the specialty involved; books and library materials, reading trends and library operations applicable to the appropriate specialty.

Requires considerable ability to: plan, assign and direct the activities of subordinate professional and non-professional library personnel; speak and write effectively; deal courteously and effectively with library users and outside organizations; evaluate books and other library materials and operations appropriate to the specialty involved; maintain records and prepare operation and activity reports.

License: Requires possession of a valid certificate as issued by an accredited school of library science.

PROMOTIVE LINES:

To: No normal line of promotion

From: Principal Librarian

CLASS TITLE: COORDINATOR, CHILDREN'S LIBRARY ACTIVITIES CODE: 3640

CHARACTERISTICS OF THE CLASS:

Under general administrative direction, performs responsible professional librarian work in coordinating, advising on and evaluating children's library activities in the library system; and performs related duties as required.

Requires major responsibility for: advising in the development of library policies and procedures for effectuating children's library services; making regular important contacts with departmental personnel, the general public and outside groups and organizations relative to children's library activities; preparing detailed recommendations and reports on children's library services.

EXAMPLES OF DUTIES:

1. Advises and assists in the formulation of policies relating to children's library services and the selection and placement of personnel concerned with children's activities.
2. Integrates children's activities throughout the library system.
3. Selects and distributes children's books and library materials to the various collections of the system.
4. Advises, stimulates and directs the training of staff personnel engaged in children's library work.
5. Maintains liaison with school authorities in the establishment and operation of reading programs and instructions on the use of children's library facilities.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of a four year college or university, with a baccalaureate degree, supplemented by completion of a prescribed course in library science at a library school accredited by the American library association.

Requires at least six years of progressively responsible professional librarian experience in children's library activities, including three years of responsible supervisory experience; or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Requires a comprehensive knowledge of: library methods, procedures and techniques, particularly as related to children's activities; books, library materials, reading trends and library operation and administration as applied to children's work.

Requires considerable ability to: study, evaluate and make sound recommendations on children's library uses and services; speak and write effectively; evaluate children's library books and materials for inclusion in the library collections; deal effectively and courteously with the various individuals and organizations interested in children's library activities.

CLASS TITLE: COORDINATOR, CHILDREN'S LIBRARY ACTIVITIES CODE: 3640
(continued)

License: Requires possession of a valid certificate as issued by an accredited school of library science.

PROMOTIVE LINES:

To: No normal line of promotion

From: Principal Librarian

SAN FRANCISCO CIVIL SERVICE COMMISSION

CLASS TITLE: COORDINATOR, ADULT LIBRARY SERVICES

CODE: 3642

CHARACTERISTICS OF THE CLASS:

Under general administrative direction, performs responsible professional library work in coordinating, advising on and evaluating adult library activities in the library system; and performs related duties as required.

Requires major responsibility for: advising in the development of library policies and procedures for effectuating adult library services; making regular important contacts with departmental personnel, the general public and outside groups and organizations relative to adult library activities; preparing detailed recommendations and reports on adult library services.

EXAMPLES OF DUTIES:

1. Advises and assists in the formulation of policies relating to adult library services and the selection and placement of personnel concerned with adult activities.
2. Integrates adult services throughout the library system.
3. Selects and coordinates the distribution of adult books and library materials to the various collections of the system.
4. Advises, stimulates and directs the training and performance of staff personnel assigned to the adult services programs.
5. Investigates, analyzes and recommends on new or improved techniques or methods relating to adult services, including automated devices, as well as planning and directing the application of modern techniques of operation to existing situations.
6. Maintains records of the operations of the adult service departments; gathers and analyzes data and submits reports and recommendations.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of a four year college or university, with a baccalaureate degree, supplemented by completion of a prescribed course in library science at a library school accredited by the American Library Association.

Requires at least six years of progressively responsible professional librarian experience in library work, including three years of responsible supervisory experience in adult services; or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Requires a comprehensive knowledge of: library methods, procedures and techniques, particularly as related to adult services; books, library materials, reading trends and library operating trends and administration as applied to adult services.

Requires considerable ability to: study, evaluate and make sound recommendations on adult library uses and services; evaluate and make recommendations regarding introduction of new library techniques and procedures; be able to speak and write effectively; evaluate adult library books and materials for inclusion in the library collections; deal effectively and

SAN FRANCISCO CIVIL SERVICE COMMISSION

CLASS TITLE: COORDINATOR, ADULT LIBRARY SERVICES
(Continued)

CODE: 3642

courteously with the various individuals and organizations interested in adult library services.

PROMOTIVE LINES:

To: No normal line of promotion.

From: Principal Librarian

Adopted 3/8/62

SAN FRANCISCO CIVIL SERVICE COMMISSION

(NEW CLASS)

CLASS TITLE: ASSISTANT CITY ARCHIVIST

CODE: 3643

CHARACTERISTICS OF THE CLASS:

Under general supervision, assists in a variety of professional duties in connection with the maintenance, extension, organization and development of the Archives Section of the Public Library; assists patrons in the use of archival materials; and performs related duties as required.

Requires responsibility for: Adherence to well-defined policies and procedures relative to the activities of the Archives Section; frequent personal contacts with library patrons, representatives of historical societies, representatives of other agencies having an interest in Archives and the general public; setting up and maintaining detailed records with respect to materials acquired for the collection.

EXAMPLES OF DUTIES:

1. Assists patrons in obtaining information in and using archival materials and in answering a wide variety of questions.
2. Performs research on prospective materials, gifts, or other acquisitions; arranges, describes and preserves items in the collection.
3. Assists in obtaining, analyzing, describing, identifying, displaying, referencing and researching materials included in the collection.
4. Maintains catalogs of materials and incidental records, files and references; prepares correspondence with respect to the acquisition of new materials.
5. As directed, assists in the development of various programs relating to special collections and specialized material in the Archives.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires possession of Master's degree in history with emphasis in San Francisco and California history.

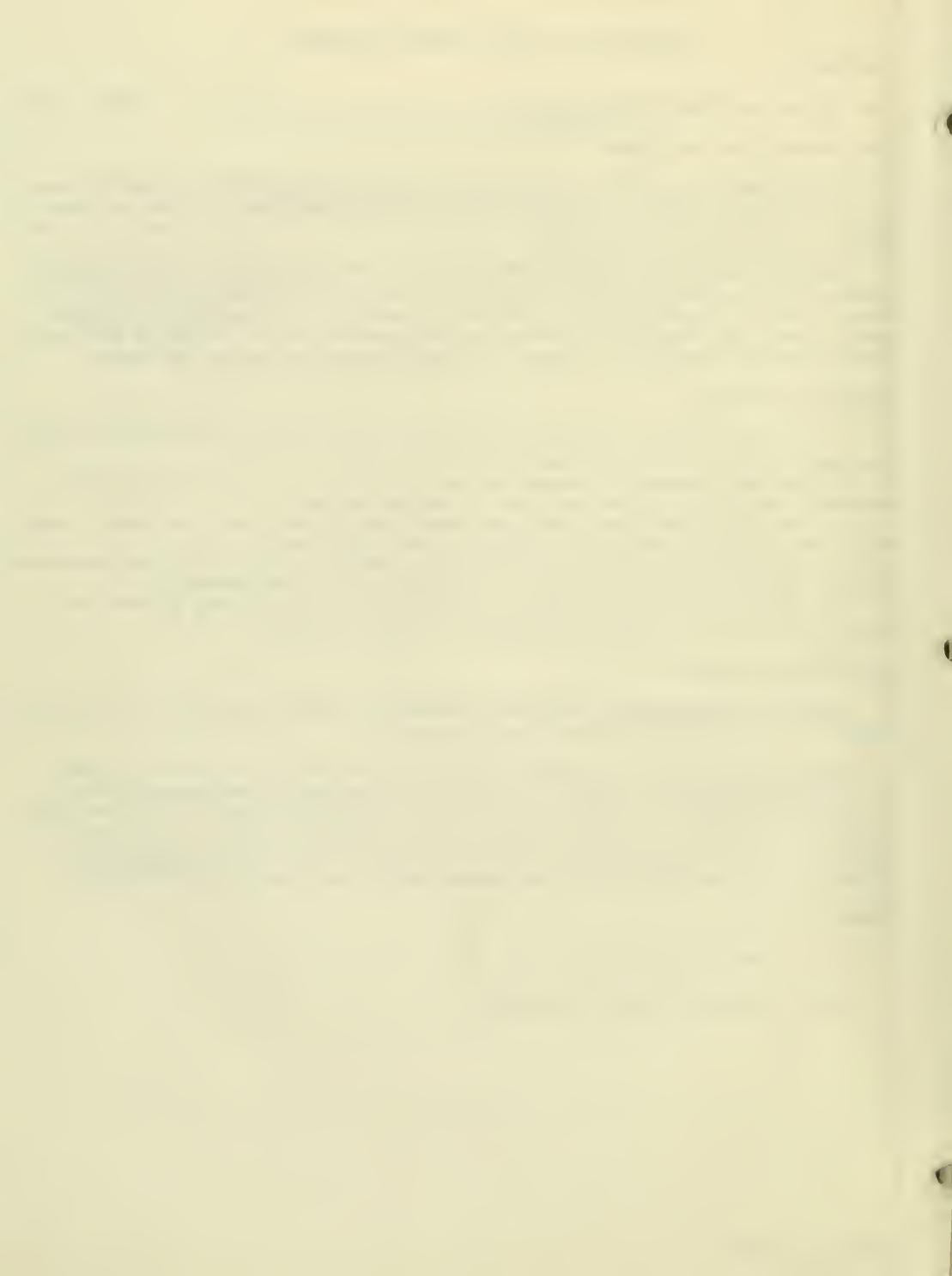
Knowledge, Abilities and Skills: Principles and concepts of archival science and a general knowledge of library science; good knowledge of California history.

Requires the ability to describe, identify and display materials included in the Archives of the Public Library; ability to use, maintain and service items such as special documents, files, records, unique collections and reference materials; deal effectively and courteously with the general public; write and speak effectively.

PROMOTIVE LINES:

To : 3644 City Archivist

From: Original entrance examination



CHARACTERISTICS OF THE CLASS:

Under direction, performs professional archivist work in supervising the operations of the Archives Section of the Main Library; performs a variety of duties in connection with obtaining, selecting, cataloging and disposing of materials for the archives; and performs related duties as required.

Requires responsibility for: Interpreting, enforcing and carrying out assigned duties within the framework of established methods and procedures; making regular contacts with the general public, outside organizations and library personnel in connection with archive operations; directs the preparation and maintenance of catalogs and related records of materials contained in the archives.

EXAMPLES OF DUTIES:

1. Directs, extends and maintains special collections of materials pertaining to California and San Francisco history and ephemeral materials; sorts, catalogs, organizes, labels and files such materials; indexes newspapers, catalogs new books and prepares books for repair and binding; prepares inventories of collections contained in the archives.

2. Conducts research requested by library patrons on materials connected with California history and related subjects; answers inquiries of the public with respect to special collections included in the archives; conducts correspondence in connection with such inquiries; prepares special bibliographies and reading lists for interested library patrons.

3. Supervises, trains and assigns the work of pages, clerks and technical personnel assigned to the archives; interprets rules, regulations and policies to subordinates and the general public.

4. Plans and sets up exhibits and displays; may supervise and make recommendations to superiors in this regard; may deliver talks with respect to special collections of Californiana; may conduct tours through the department; attends professional meetings related to archivist activities and California history.

5. Orders new books, second-hand materials and ephemeral materials related to California history and specifically San Francisco history, both governmental and public; orders magazines and other publications in these fields.

6. Contacts individuals, various organizations, public and governmental, in seeking and arranging for acquisition of materials.

7. Researches materials and writes histories of governmental and public organizations.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires possession of a master's degree in library Science.

Requires four years of progressively responsible experience in the operation, planning and supervision of archives in a large library system or other institution.

Knowledge, Abilities and Skills: Requires considerable knowledge of library methods, procedures and techniques, especially those relating to the operation of the archives; sources of materials appropriate for inclusion in collections of California and San Francisco history; knowledge of the role of the archives.

Requires considerable ability to: Analyze, evaluate and recommend on the acquisition of a variety of materials to be included in archives or historical collections; supervise the work of subordinates; deal courteously and effectively with the public and with representatives of other libraries and organizations; speak and write effectively.

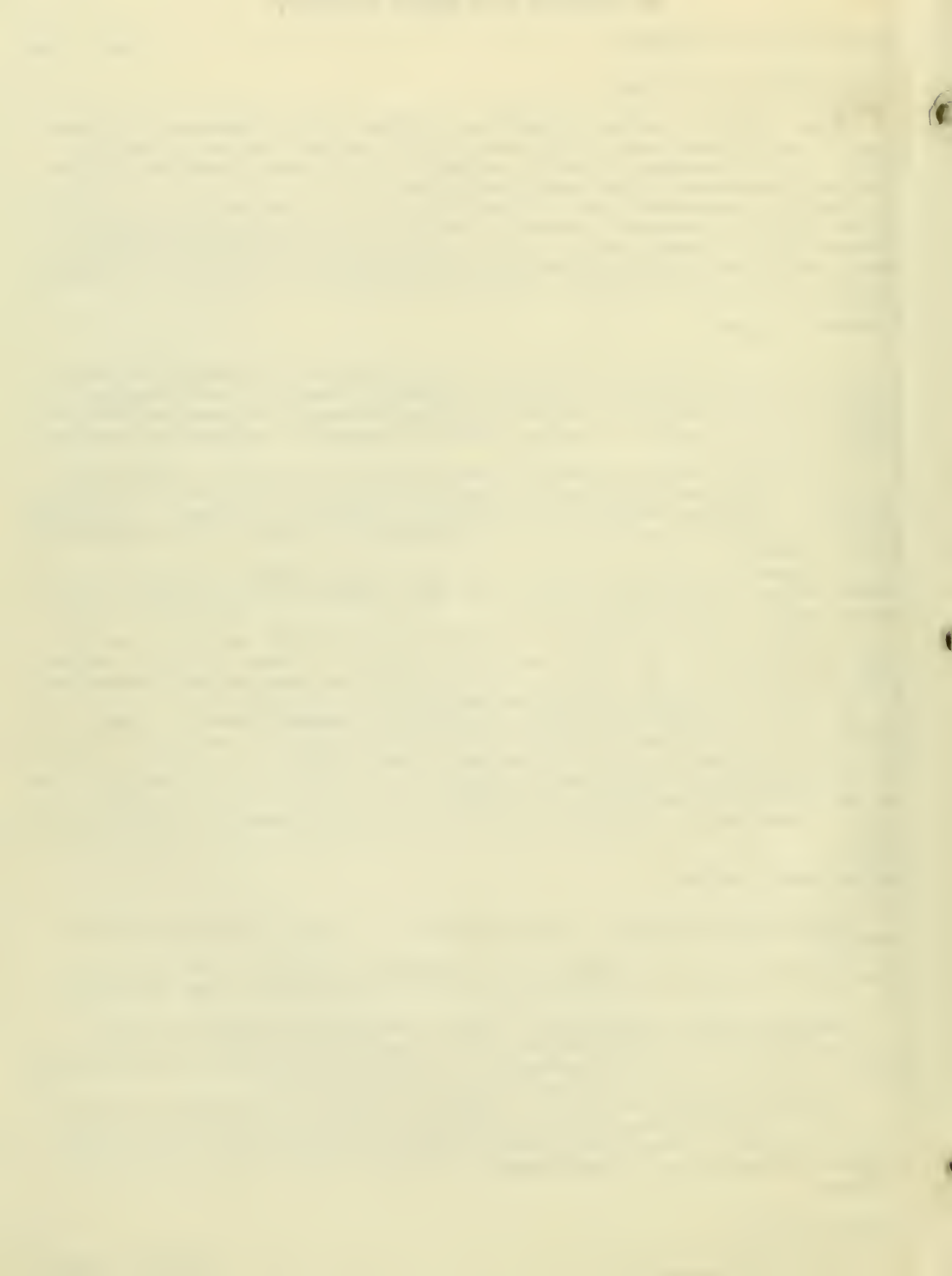
PROMOTIVE LINES:

To : 3634 Librarian III

Adopted: 12/3/74

From: 3630 Librarian I

Amended: 5/5/75



CLASS TITLE: MEDICAL RECORD LIBRARIAN

CODE: 3650

CHARACTERISTICS OF THE CLASS:

Under general supervision, analyzes, codes and compiles all medical records on patients treated at the general hospital; assists the medical staff in the selection of cases for specific research projects; may supervise assigned clerical assistants; and performs related duties as required.

Requires responsibility for: following prescribed standards, methods and procedures relative to the analysis, coding and consolidation of medical records according to standard nomenclature; making responsible contacts with the general public and representatives of outside groups to identify medical record data, furnish information and medical recording procedures to medical staff research work; the preparation of detailed narrative and statistical records and reports.

EXAMPLES OF DUTIES:

1. Processes medical records of patients by analyzing, assembling, coding, rearranging and checking for compliance with established policy on nomenclature and procedures; files charts and assists in the revision of files.

2. Consults with doctors, nurses and other hospital personnel relative to defects in medical records, inaccurate coding, incomplete information and follows up to accurately complete medical records.

3. Abstracts information from medical records for statistical indexing and for the preparation of summary reports to official agencies requesting medical information on patients.

4. Maintains statistical records on special studies; prepares narrative, statistical and graphic reports for hospital use or for official agencies.

5. Assists medical staff in compiling data for research projects.

6. May assist in the training and supervision of assigned clerical personnel.

7. When required, takes hospital records to court, attests to their authenticity and accuracy and assumes responsibility for the return of such records.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of a prescribed course in medical record librarianship in a school accredited by the American Medical Association; or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Requires good knowledge of: standard nomenclature and classification systems used in medical record libraries for coding and classifying diseases and their complications; the use of statistics in the preparation of hospital medical records.

Requires ability to: recognize and follow-up inconsistencies in medical records; analyze data, draw logical conclusions and submit reports; prepare clear, concise, narrative, statistical and graphic reports; establish and maintain cooperative working relationships with

CLASS TITLE: MEDICAL RECORD LIBRARIAN (continued)

CODE: 3650

the general public and departmental personnel.

License: Requires possession of a valid certificate as a registered medical record librarian issued by the american association of record librarians.

PROMOTIVE LINES:

To: Senior Medical Librarian

From: Original entrance examination

SAN FRANCISCO CIVIL SERVICE COMMISSION

CLASS TITLE: MEDICAL RECORDS LIBRARY SUPERVISOR

CODE: 3654

CHARACTERISTICS OF THE CLASS:

Under direction, supervises and is responsible for the operation of the medical record sections of the institutions of the Department of Public Health; exercises supervision over medical record librarians and other personnel engaged in collecting, analyzing and compiling medical case records; compiles and supervises the compilation of narrative and statistical records and reports; may conduct training courses for medical record library trainees; and performs related duties as required.

Requires responsibility for: establishing, interpreting and enforcing policies, procedures and regulations for collecting and compiling medical records according to standard nomenclature of diseases and operations as established by the Joint Commission on Accreditation of Hospitals and Specialty boards of the American Medical Association; instituting changes in methods and procedures as necessary; the custody and safeguarding of important and valuable medical records; making important responsible contacts with the general public and representatives of outside groups to furnish information and identify medical records; explaining requirements for medical recording to the medical staff engaged in research projects; preparing, supervising and reviewing the preparation of detailed narrative and statistical records and reports.

EXAMPLES OF DUTIES:

1. Organizes, supervises and controls all the activities of the medical record sections; trains new employees, assigns and reviews work and establishes work flow patterns for the unit.

2. Assists medical staff in compiling data for research projects by explaining procedures, practices and requirements for complete medical case records.

3. Receives and screens requests from other official agencies for medical summary and statistical information; consults and corresponds with personnel of such agencies; prepares reports by abstracting information from medical records.

4. Keeps current on changes in the medical-legal requirements for accredited record keeping and recordings; analyzes existing system and institutes required changes in procedures and methods.

5. Prepares medical record sections' budget estimates; gathers data and prepares justifications for requests for personnel and equipment.

6. Handles processing of difficult and controversial medical records and takes records to court in sensitive cases.

7. May supervise and be responsible for employees of a Central Dictation pool, and to develop a program of modern record keeping through electronic or other data processing systems.

8. Confers with attorneys, insurance representatives, patients' relatives and other authorized persons regarding the release and/or disposition of confidential medical information.

9. As required, testifies in court regarding information contained in patient's medical records.

CLASS TITLE: MEDICAL RECORDS LIBRARY SUPERVISOR
(continued)

CODE: 3654

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of a prescribed course in medical record librarianship in a school approved by the Council of Medical Education and Hospitals of the American Medical Association supplemented by three years of responsible experience as a medical record librarian in an accredited teaching general hospital; or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Requires considerable knowledge of: the principles, practices and legal implications of medical record keeping and the principles, practices and methods involved in analyzing and recording medical information.

Requires ability to: analyze data and draw logical conclusions based on intensive knowledge in the field of modern medical record keeping; prepare clear and concise narrative, statistical and graphic reports; establish and maintain cooperative working relations; supervise and train subordinate and other personnel.

License: Requires possession of a valid certificate as a Registered Medical Record Librarian issued by the American Association of Medical Record Librarians.

PROMOTIVE LINES:

To: No normal lines of promotion.

From: Medical Record Librarian

SAN FRANCISCO CIVIL SERVICE COMMISSION

CLASS TITLE: MEDICAL LIBRARIAN

CODE: 3658

CHARACTERISTICS OF THE CLASS:

Under direction, has charge of and is responsible for a medical library; selects, acquires and maintains medical books and periodicals; may train and supervise subordinates; and performs related duties as required.

Requires responsibility for: interpreting, enforcing, carrying out and assisting in the development of policies, methods and procedures relative to medical library activities; making regular contacts with a medical staff, ancillary personnel and outside organizations in connection with medical library operations; preparing, checking and reviewing operating records and reports relative to medical library functions.

EXAMPLES OF DUTIES:

1. Selects, acquires and maintains a library of medical books and periodicals; receives, classifies and catalogues library materials; maintains a dictionary catalogue.
2. Is responsible for circulation and loan activities; provides reference and research facilities for the medical staff, including the analysis of book and periodical content and the indexing of such material for quick and easy reference; compiles bibliographies.
3. Participates in the planning of the library expansion program; makes suggestions regarding the improvement and/or expansion of present services; attends professional conferences.
4. Keeps performance records to justify requests for increases in the medical library budget; may train and supervise assistants.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires graduation from a four-year college or university, including courses in the natural sciences and languages, and supplemented by completion of at least one year of training in a library school accredited by the American Library Association.

Requires at least one year of experience in professional library work in a medical, biological, zoological or public health library; or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Requires good knowledge of: medical literature, including medical texts and periodicals; selection, acquisition and classification of medical literature; reference and bibliographic procedures; budgetary procedures.

Requires ability and skill to: plan and organize the work of a medical library; supervise the work of others; exercise good judgment in the selection of library material; deal courteously with the medical staff.

License: Requires possession of, or eligibility for, a certificate in medical librarianship approved by the Medical Library Association.

PROMOTIVE LINES:

To: Principal Librarian

From: Librarian



SAN FRANCISCO CIVIL SERVICE COMMISSION

CLASS TITLE: LIBRARIAN (AVERY BRUNDAGE COLLECTION OF ASIAN ART)

CODE: 3660

CHARACTERISTICS OF THE CLASS:

Under general supervision, plans, organizes, and carries out professional library activities in connection with the Avery Brundage Collection of Asian Art; and performs related duties as required.

Requires responsibility for: interpreting, enforcing and carrying out existing methods and procedures relating to the library; making regular contacts with patrons of the museum, departmental personnel and outside organizations in connection with library activities and operations; gathering, preparing and maintaining operating reports and records relative to library activities.

EXAMPLES OF DUTIES:

1. Selects, acquires, catalogs, classifies and circulates books, periodicals, micro-films, slides and other library material relating to Oriental art.
2. Performs bibliographical research for department personnel and assists department personnel, museum patrons, outside groups and others in locating information; may translate or order translation of materials from foreign languages into English.
3. Prepares and maintains a variety of records, files and reports relative to library activities and keeps records of movement of books, periodicals, micro-films, slides and other library materials.
4. Binds and repairs books, periodicals and other library materials; mounts slides and photographs.
5. Supervises exchange of publications with other libraries and museums of Oriental art.
6. May conduct lectures and classes on bibliographic material in the collection.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of a four-year college or university, with a baccalaureate degree, supplemented by completion of a prescribed course in library science in a library school accredited by the American Library Association. Requires a reading knowledge of Japanese or Chinese. Requires at least two years of varied progressively responsible library experience.

Knowledge, Abilities and Skills: Requires good knowledge of: modern library methods, procedures and techniques; books, materials, reading trends and operations of an Oriental Art Library.

Requires the ability to read Japanese or Chinese.

Requires the ability to: establish effective working relationships with department personnel, museum patrons, and outside organizations; evaluate a variety of books, magazines, periodicals, photographs and similar library material; advise and instruct others in the use of library services and facilities; use common office equipment and machines and prepare ordinary operating reports.

License: Requires possession of a valid certificate as issued by an accredited school of library science.

PROMOTIVE LINES:

To : No normal lines of promotion

From: Original entrance examination

ADOPTED: August 31, 1967



SEP 30 1998

PUBLIC LIBRARY

**CITY AND COUNTY OF SAN FRANCISCO
DEPARTMENT OF HUMAN RESOURCES****CLASS TITLE: DEPUTY CITY LIBRARIAN****CODE: 3668****DEFINITION:**

Under the general administrative direction of the City Librarian, acts as the assistant to the City Librarian in the administration of all operations and activities of the Public Library.

Major responsibilities include: executing and interpreting library policies; administering public service departments of the Library, acting as department head in the absence of the City Librarian; representing the Library to outside organizations; directing the preparation of technical and operational policies and rules for public service; interpreting and explaining Library policy to outside agencies, and directing the preparation of records and reports.

SUPERVISION EXERCISED:

Provides general and technical direction to Librarian IV's and related library managers engaged in public service activities. This class has supervisory responsibility for the functional areas of Reference and Resources, Branch Libraries, Children and Youth, Community Relations, and Collection Management.

EXAMPLES OF IMPORTANT AND ESSENTIAL DUTIES:

"The class specification shall be descriptive of the class and shall not be considered as a restriction on the assignment of duties not specifically listed." (CSC Rule 9.3.2)

1. Plans, directs and coordinates the work of all public service departments of the Library.
2. Acts for the City Librarian in her/his absence.
3. Reviews the methods and procedures used in public service departments, develops and implements changes when necessary.
4. Coordinates work of public service departments with overall Library program; reviews program content of children's library activities, adult library activities and grant funded programs and makes recommendations to the City Librarian.
5. Assists the City Librarian in the planning and development of a city-wide Library program; gathers data, prepares administrative and operational reports; conducts investigations of library activities; evaluates program needs and recommends appropriate action.

6. Represents Library before civic groups, employee organizations, professional organizations, the Library Commission, speaks to the public on library activities, policies and planning; acts as host to official visitors.
7. Coordinates Library's annual budget submittal; confers with department heads and library management staff on administrative and operational problems.
8. Performs related duties and responsibilities as assigned

JOB RELATED AND ESSENTIAL QUALIFICATIONS:

Knowledge of: Principles and practices of librarianship, including operation of reader services programs through a branch library system; technical services, such as cataloging, reference and bibliography; and the principles of organization, administration and management of a modern library, including providing service through automated, on-line systems.

Ability to: Assume a primary role in the overall administration, planning and direction of a comprehensive library program in a large, progressive metropolitan library system; review and analyze library needs and make appropriate recommendations; interact well with boards and commissions; prepare and execute budget recommendations; speak and write effectively; maintain a positive working relationship with subordinates and the public.

EXPERIENCE AND TRAINING GUIDELINES: Any combination of training and experience that could likely provide the required knowledge and abilities may be qualifying. A typical way to obtain this would be:

Experience: Requires at least eight (8) years progressively responsible professional library experience in a large urban library; four (4) years of which must have been at the managerial level.

Training: Requires completion of a four year college or university with a baccalaureate degree, and the possession of a Master of Library Science, or, Library Information Science degree from a school accredited by the American Library Association.

Effective Date: August 14, 1998

CIVIL SERVICE COMMISSION OF SAN FRANCISCO

CLASS TITLE: ASSISTANT CITY LIBRARIAN

CODE: 3668

CHARACTERISTICS OF THE CLASS:

Under general administrative direction, acts as a principal assistant to the City Librarian in the administration of all operations and activities of the Public Library department; and performs related duties as required.

Requires major responsibility for: assisting in coordinating, developing, executing and interpreting library department policies; making frequent personal contacts with department heads and employees, representatives of outside organizations and others involving discussion, explanation and interpretation of library policy, methods and rules; preparing, directing the preparation of, and reviewing a variety of technical and operational records and reports.

EXAMPLES OF DUTIES:

1. Supervises all public services of the library; relieves City Librarian of administrative detail in planning, directing and coordinating the work of the various library departments; acts for the City Librarian in his absence.

2. Directs the operation of the main library public departments and branch libraries; reviews the methods and procedures used in various departments and recommends necessary revisions.

3. Directs, through subordinate supervisory personnel, children's library activities, adult library activities and the library public relations program; coordinates this work with that of the overall library program; reviews program content and makes recommendations thereon to the City Librarian.

4. Assists the City Librarian in the planning and development of a city-wide library program; gathers data, prepares a wide variety of administrative and operational reports; conducts investigations of library activities; evaluates program needs and recommends appropriate action.

5. As directed, represents the library before civic groups, employee organizations, groups interested in library activities and professional organizations; prepares and delivers talks on library activities, policies and aims; acts as host to official visitors.

6. Directs and actively participates in departmental in-service training programs and makes evaluations and recommendations thereon; confers with department heads on a variety of administrative and operational problems; recommends re-assignments of personnel.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of a four year college or university, with a baccalaureate degree, supplemented by completion of a prescribed course in library science, from a school accredited by the American Library Association.

CLASS TITLE: ASSISTANT CITY LIBRARIAN

CODE: 3668

Requires at least eight years of progressively responsible professional library experience, including four years of responsible supervisory and administrative experience; or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Requires comprehensive knowledge of: the principles and practices of librarianship, including the problems and procedures involved in operating a reader services program through a branch library system, and the technical services, such as cataloging, reference work, and bibliography connected with such a program; considerable knowledge of the principles of organization, administration, and management of a modern library, as well as the plant and equipment.

Requires considerable ability to: assist in the overall administration, planning and direction of a comprehensive library program in a large metropolitan library system; review and analyze library needs; make appropriate recommendations relating to library content, public relations, physical plant, budgeting and other aspects of library administration; speak and write effectively; represent the library before outside organizations.

PROMOTIVE LINES:

To: No normal line of promotion.

From: Chief Librarian

Adopted: 5/10/62

SAN FRANCISCO CIVIL SERVICE COMMISSION

CLASS TITLE: CITY LIBRARIAN

CODE: 3670

CHARACTERISTICS OF THE CLASS:

Subject to the policy determination of the library commission, has charge of and is responsible for the administration and operation of the public library department; plans and directs the activities of professional and non-professional library personnel in connection therewith; and performs related duties as required.

Requires major responsibility for: coordinating, developing and executing policies and methods relating to the administration of the library system; continuing personal contacts with employees, representatives of organizations and groups involving discussion, explanation and interpretation of professional library policy, methods, rules and regulations; directing the preparation, review and approval of operational and technical records and reports.

EXAMPLES OF DUTIES:

1. Directs the activities of all departments and branch libraries in the library system, including the assignment and training of personnel.
2. Directs the preparation of library department budget and is responsible for the expenditure of all funds; administers the upkeep and maintenance of library property.
3. Prepares or directs the preparation of a wide variety of reports on library operations for city and state officials and outside professional organizations; answers professional and technical inquiries on public library policies and procedures; organizes various cultural and literary functions.
4. Plans development and expansion programs for the library system; consults with and discusses development programs with city officials, civic leaders, architects and contractors.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of a four year college or university, with a baccalaureate degree, supplemented by completion of a prescribed course in library science in a library school accredited by the American library association.

Requires at least ten years of progressively responsible professional library experience, including five years of responsible supervisory and administrative experience; or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Requires comprehensive knowledge of: the principles and practices of librarianship, including the problems and procedures involved in operating a reader services program through a branch library system, and the technical services such as cataloging, reference work, and bibliography connected with such a program; the principles of organization, administration, and management; a modern library plant and equipment.

CLASS TITLE: CITY LIBRARIAN
(continued)

CODE: 3670

Requires considerable ability to: plan, organize, and direct a comprehensive program for providing library services in a large metropolitan library system; analyze community needs and embody conclusions in specific plans for modifying or extending reader services; effectively evaluate book collection needs in the system; prepare and supervise the preparation of publicity material; determine the plant, equipment and staffing requirements and formulate budget recommendations and justifications on the basis thereof; work effectively with the public, other professional staff members and professional people from other agencies.

License: Requires possession of a valid certificate as issued by an accredited school of library science.

PROMOTIVE LINES:

No normal lines of promotion - class exempt from examination.

[effective January 12, 1961]

CLASS TITLE: AIRPORT PROPERTY MANAGEMENT ASSISTANT

CODE: 4102

CHARACTERISTICS OF THE CLASS:

Under direction, performs specialized airport lease and insurance work in analyzing and determining that lease and other contractual agreement provisions are being complied with by airport tenants; compiles and maintains lease, permit and other contractual agreement records; assists in the negotiations for the rental of airport properties involving short-term occupancies; and performs related duties as required.

Requires responsibility for: Carrying out, explaining, and enforcing methods and procedures pertaining to the review, proper recording and follow-up system for various airport lease, permit, or other contractual agreement provisions; assembling, checking and maintaining lease and related records and preparing important reports related thereto; making regular contact with tenants, employees and representatives of outside agencies for the purpose of furnishing or obtaining information relative to airport lease, permit, or other contractual agreement provisions.

EXAMPLES OF DUTIES:

1. Analyzes lease agreements, permits, or lease extensions and determines requirements to assure lessee has complied with insurance, bonds, and other provisions; records pertinent data on master index form in order to readily identify lease provisions and requirements; requests lessee to furnish required documents in order to conform with lease provisions; makes follow-up forms for lease provisions, including installation of improvements, extent of investment, fire insurance, real property tax, amortization, termination of lease data and other provisions.
2. Verifies availability of areas leased, correct rental rate and total rental due; posts pertinent data and provisions of the agreement to various control sheets in summary form; prepares resolutions verifying compliance by lessee.
3. Assists management in the negotiations for the rental of airport properties involving space or use permits; meets with prospective airport tenants to advise them of availability of property, rates, fees, and airport policies regarding occupancy; prepares permits for approval; prepares special operation permits when directed.
4. Submits memoranda to airport management pertaining to noncompliance by lessee, terminations and renewals of lease, and other provisions; maintains index for spaces occupied or vacant.
5. Posts the utilities pending summary requirements as contained in lease and forwards memorandum to the airport manager; verifies monthly electric and water bills of tenants to determine that billing has been rendered as required under lease.
6. Requests riders and endorsements to support bonds or insurance documents on hand each time a lease or other document is amended.
7. Prepares annual report to the Public Utilities Commission on revenue gains from leases and other agreements; prepares reports on lease provisions, types of leases, types and class of tenants; compiles regular and special reports on airport use.

(continued)

(RETITLES AND AMENDS
SPECIFICATION)

CLASS TITLE: AIRPORT PROPERTY MANAGEMENT ASSISTANT

CODE: 4102

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of high school, supplemented by at least 4 years of progressively responsible clerical and office experience in the processing and handling of leases, permits, or similar documents; or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Requires good knowledge of insurance terminology and legal documents, particularly as applicable to lease forms and similar records.

Requires ability to: Prepare clear and concise correspondence and reports; deal effectively and courteously with lease holders and other departmental personnel.

PROMOTIVE LINES:

To : 4110 Rental Property Supervisor

From: Original entrance examination

AMENDED: September 16, 1968

CLASS TITLE: RENTAL PROPERTY SUPERVISOR

CODE: 4110

CHARACTERISTICS OF THE CLASS:

Under general direction, is responsible for supervision of rental property owned or leased by the city and county; acts as office manager; collects, pays and accounts for rent; arranges for maintenance and repair of property rented by the city; and performs related duties as required.

Requires responsibility for: carrying out, interpreting, explaining and enforcing existing policy, methods and procedures relative to rental property owned or leased by the city; making regular contacts with the general public and tenants for the purpose of furnishing or obtaining information or explaining procedures and regulations relative to the occupancy of rental property; preparing and maintaining ordinary financial and maintenance records in connection with rental property.

EXAMPLES OF DUTIES:

1. Assures that property purchased by the city and county is properly recorded; figures rental fees based on an established formula; collects and accounts for rents due the city and county; pays rents due to private interests on property leased by the city and county.

2. Keeps accounts receivable record for each lessee and renders bills when rent has become delinquent; refers delinquencies which have exceeded time limitations to the bureau of delinquent revenue for collection.

3. Studies leases to see that conditions are met relative to insurance, bonds and due dates; prepares simple lease forms for approval by city attorney.

4. Acts as auctioneer for public sale of property.

5. Advertises and receives bids for demolition and removal of property owned by the city and county; arranges for maintenance and repair of city-owned property leased to private parties.

6. Deposits money received from rental and sale of property and prepares monthly report of revenue collections.

7. Acts as office manager in budget preparation and control, processing payrolls, invoices, work orders and related clerical work.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of high school, supplemented by college level training in business administration or accounting.

Requires at least six years of progressively responsible experience in the management, maintenance and repair of rental properties including supervision of related office activities, procedures and personnel; or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Requires good knowledge of: basic accounting principles and practices; the regulations governing the disposal of city-owned property by sale or removal; budget procedures.

CLASS TITLE: RENTAL PROPERTY SUPERVISOR (continued)

CODE: 4110

Requires ability to: keep and maintain simple accounts receivable and accounts payable records; prepare simple leases; deal tactfully, courteously and effectively with tenants and outside groups; prepare clear, concise and accurate reports.

PROMOTIVE LINES:

To: No normal lines of promotion

From: ~~Airport Lease Records Supervisor~~
Original Entrance Examination

SAN FRANCISCO CIVIL SERVICE COMMISSION

CLASS TITLE: PERFORMING ARTS CENTER AIDE

CODE: 4119

CHARACTERISTICS OF THE CLASS:

Under direction serves as an aide to management in the administration, maintenance, operation and promotion of the War Memorial and Performing Arts facilities; coordinates custodial, security and service functions; assists in sales and promotion activities; manages booking and scheduling of events; and performs related duties as required.

DISTINGUISHING FEATURES:

Positions in this class perform administrative or managerial duties in a staff capacity to assist the Managing Director and the Assistant Managing Director of the War Memorial and Performing Arts Center. Incumbents work independently on assignments relating to sales, booking, promotion and operations, and are expected to show initiative in recommending policy or procedural changes to maximize usage of the facilities. The nature of the work requires frequent contact with facility users, the general public and departmental personnel.

EXAMPLES OF DUTIES:

1. Familiarizes all facility users with rules and regulations of the Center; evaluates user needs to determine necessary facility services and personnel for each event.
2. Develops and maintains operating manuals for security and custodial personnel; develops and implements procedures regarding the safety of personnel and patrons in the facilities; investigates and reports on all theft or security incidents.
3. Coordinates nursing staff for all events; keeps nursing stations properly equipped; reviews and investigates all accident and hospital reports.
4. Responds to inquiries in writing, in person or on the telephone regarding rental guidelines, costs, services and facilities; provides cost estimates to tenant organizations; prepares and administers rental contracts.
5. Maintains activity calendar for facilities; resolves conflicts over booking dates; maintains records on all tenants and events.
6. Arranges publicity releases and newspaper coverage of department's events, programs and activities; maintains mailing list for use in press releases; coordinates bulk rate advertising system for tenants.
7. Monitors and approves all advertising, posters, handouts, flyers and programs developed by guest tenants; maintains and updates Center Sales Brochure and press mailing list.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of a four year college or university with a baccalaureate degree, with major course work in business administration, public administration, communications or a related field.

Requires at least three years of progressively responsible office, accounting and business management experience, preferably including substantial public relations experience; or an equivalent combination of training and experience.



MINIMUM QUALIFICATIONS: (Cont.)

Knowledge, Abilities and Skills: Requires considerable knowledge of: principles, practices, methods and techniques of theater management, including operations, promotions and contract administration.

Requires considerable ability to: plan, organize, coordinate and promote the activities of the department; make sound judgements and recommendations as to procedures and policies; establish and maintain effective working relationships with facility users, the general public and departmental employees.

Requires skill in: speaking effectively and writing clearly and concisely; preparing a variety of records and reports for administration and publication.

ADOPTED: 9-20-82

SAN FRANCISCO CIVIL SERVICE COMMISSION

CLASS TITLE: ASSISTANT MANAGING DIRECTOR, WAR MEMORIAL
PERFORMING ARTS CENTER

CODE: 4120

CHARACTERISTICS OF THE CLASS:

Under general administrative direction, assists the Managing Director in planning, organizing and supervising the operations, personnel and related activities of the War Memorial Performing Arts Center; acts for the Managing Director in the latter's absence; serves as secretary to the Board of Trustees; and performs related duties as required.

DISTINGUISHING FEATURES:

This single position classification is filled by appointment of the Board of Trustees. The incumbent is next in line of authority to the Managing Director, assumes full responsibility in the latter's absence, and relieves the Managing Director from the necessity of devoting close attention to a variety of administrative problems and details.

EXAMPLES OF DUTIES:

1. Supervises and coordinates all of the functional activities and personnel engaged in maintaining and operating the War Memorial Performing Arts Center. Directs administrative, engineering, janitorial, security and related operating personnel.
2. Prepares the departmental budget; recommends and controls expenditures; directs the preparation and maintenance of all fiscal documents and other departmental records.
3. Serves as Secretary to the Board of Trustees in supervising the recording of all actions of the Board; prepares, files and distributes Board minutes. Prepares notices and makes preparation for all Board meetings. Serves as parliamentary advisor to Board of Trustees.
4. Arranges for bookings of space to tenants; maintains continuing liaison with tenants in the scheduling and coordination of all events. Assists the Managing Director in the negotiation, development and administration of contracts with tenants.
5. Serves as the Managing Director in the latter's absence. Serves as departmental representative to tenants and patrons during events.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of a four-year college or university with a baccalaureate degree, with major course work in public administration, business administration or a closely related field.

Requires at least six years of progressively responsible administrative experience; or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Requires considerable knowledge of: the principles, practices, methods and techniques of budgeting, financial record keeping, organizing, administration and management; the functions and responsibilities of the Board of Trustees.

Requires considerable ability to: plan, coordinate and supervise the work of subordinates involved in the maintenance and operation of a large performing arts complex; meet and deal effectively with departmental officials, representatives of outside organizations and agencies and the general public; review, evaluate, prepare and maintain a wide variety of financial, operational and personnel records and reports.

Note: This position is exempt from examination (Charter Section 3.611).

AMENDED: 9-22-80

CLASS TITLE: EXECUTIVE SECRETARY, BOARD OF TRUSTEES,
WAR MEMORIAL

CODE: 4120

CHARACTERISTICS OF THE CLASS:

Under general administrative direction, performs difficult and responsible office and administrative work in connection with the operations of the offices of the board of trustees and the managing director; serves as secretary to the board of trustees; and performs related duties as required.

Requires responsibility for: interpreting, coordinating and carrying out policies and procedures relative to the operations of the war memorial and the board of trustees office; making regular personal contacts with other departmental personnel, outside organizations and agencies and the general public relative to the operations of the war memorial and its board of trustees; the preparation and maintenance of important operational, financial and personnel records.

EXAMPLES OF DUTIES:

1. Serves as secretary to the board of trustees in recording all actions of the board in the preparation, proper filing and distribution of board minutes; prepares notices and makes preparations for all board meetings.

2. Assists in supervising the maintenance and care of the war memorial and opera house facilities.

3. Is responsible for the maintenance of all financial records and related transactions and for the preparation and maintenance of all departmental personnel records.

4. Prepares and issues purchase orders, requisitions and work orders necessary to the acquisition of materials, supplies and services for the war memorial and opera house.

5. Provides information to callers on exhibits, performances and other affairs taking place in the war memorial or opera house; collects material and data and prepares annual budget.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of a four-year college or university with a baccalaureate degree, with major course work in public administration, business administration or a closely related field.

Requires at least six years of progressively responsible office and administrative experience; or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Requires considerable knowledge of: modern office management and administrative techniques and methods and of related financial and accounting transactions; the functions and responsibilities of the board of trustees.



CLASS TITLE: EXECUTIVE SECRETARY, BOARD OF TRUSTEES,
WAR MEMORIAL (continued)

CODE: 4120

Requires considerable ability to: meet and deal effectively and courteously with departmental officials, representatives of outside organizations and agencies and the general public; review, evaluate, prepare and maintain a wide variety of financial, operational and personnel records and reports.

PROMOTIVE LINES:

No normal lines of promotion - position exempt from examination.

SAN FRANCISCO CIVIL SERVICE COMMISSION

CLASS TITLE: MANAGING DIRECTOR, WAR MEMORIAL

CODE: 4122

CHARACTERISTICS OF THE CLASS:

Subject to the policy determination of the board of trustees, has charge of and is responsible for the proper administration, maintenance and operation of the war memorial and opera house; negotiates and arranges for the rental and leasing of space and the booking of tenants and engagements in these facilities; and performs related duties as required.

Requires major responsibility for: developing, coordinating and executing policies and procedures relative to the maintenance, operation and management of assigned buildings; making responsible personal contacts with representatives of outside agencies, theatrical organizations and the general public in connection with departmental operations; directing the maintenance and preparation of a variety of personnel, financial and other reports.

EXAMPLES OF DUTIES:

1. Arranges for the leasing and booking of tenants and engagements in the buildings; negotiates and executes contracts for leaseings and bookings; solicits bookings for the opera house and directs the preparation of physical plant facilities for the various performances and activities in the buildings.

2. Inspects physical plant facilities and recommends maintenance, repair or improvement for such facilities; inspects and approves all alteration work on such buildings.

3. Assures the objectives of all laws and regulations relating to public safety are complied with by facilities users.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of a four-year college or university, with a baccalaureate degree, with major course work in business administration, public administration, accounting or a closely related field.

Requires at least eight years of progressively responsible experience in building and business management, including four years of responsible supervisory experience; or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Requires considerable knowledge of: budget procedures and principles and the techniques of administrative organization and management; standard contracts, leases and rental agreements; the rules, regulations and laws pertaining to public safety in large facilities and buildings.

Requires considerable ability to: deal courteously, effectively, and tactfully with outside groups and representatives and various entertainment and cultural organizations in establishing and maintaining good public relations; make sound judgments and recommendations as to rental and leasing of facilities; direct, review and approve the work of subordinates.

PROMOTIVE LINES:

No normal lines of promotion - class exempt from examination.

SAN FRANCISCO CIVIL SERVICE COMMISSION

CLASS TITLE: DIRECTOR, PERFORMING ARTS CENTER AND WAR MEMORIAL

CODE: 4124

CHARACTERISTICS OF THE CLASS:

Subject to the policy determination of the Board of Trustees, plans, directs, coordinates and promotes the activities of all facilities of the Performing Arts Center and War Memorial complex; directs, through subordinate management personnel, the scheduling of events, physical plant operations, promotional activities and budget for the complex; maintains liaison with individuals and groups interested in the advancement of the performing arts and cooperates with public agencies and private organizations with a view toward providing maximum usage of the facilities by all segments of the artistic and cultural communities; and performs related duties as required.

DISTINGUISHING FEATURES:

This single position class is filled by appointment of the Board of Trustees and the incumbent serves at their pleasure, carrying out Board policies with respect to the management of a large and diverse performing arts complex. Directs subordinate staff in the operation of facilities and the promotion of activities in connection with providing a variety of musical, dance, drama and other cultural or entertainment activities.

EXAMPLES OF DUTIES:

1. Promotes and develops the usage of all Performing Arts Center facilities; directs and participates in a program of public relations, including the preparation of press releases, provision for media coverage of events; extends cooperation to promoters of events, community groups and others interested in the performing arts.
2. Establishes and maintains contact with theatrical, ballet, symphony, opera and dance companies and their representatives.
3. Develops and maintains continuing liaison with the fine arts community, both on a national and international basis.
4. Directs the preparation of and reviews press releases and other material relating to events held at the Performing Arts Center.
5. Directs the management of facility operations, including staffing, maintenance and repair and necessary physical plant alterations.
6. Directs budget preparation for the complex; reviews, approves and submits budget estimates and revenue projections; administers the performing arts approved budget; identifies funding services, makes grant applications and develops funding programs.
7. Reviews all aspects of the operation of the Performing Arts Center, including facilities' operation, scheduling and coordination of events and staffing with a view toward the improvement of procedures and maximizing usage of the Center and revenue from the facility.
8. Directs the negotiation and preparation of contractual agreements with users of the Performing Arts Center.
9. As directed, represents the Performing Arts Center before legislative bodies, community groups or other organizations.

CLASS TITLE: DIRECTOR, PERFORMING ARTS CENTER AND WAR MEMORIAL

CODE: 4124

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of a four-year college or university with a baccalaureate degree, with major course work in business administration, public administration, public relations or a closely related field.

Requires ten (10) years of progressively responsible experience in the management of a large, multi-purpose, cultural, entertainment or performing arts facility.

Knowledge, Abilities and Skills: Requires a thorough knowledge of business principles and practices connected with the presentation of theatrical, cultural or artistic performances; the function and organization of municipal government; the theatrical and artistic community.

Requires considerable ability to direct, plan and coordinate the activities of a large and diverse performing arts complex; represent the Performing Arts Center before community groups, legislative bodies and others; speak and write effectively.

PROMOTIVE LINES: Position exempt from examination.

RETITLED AND AMENDED: 9-11-79

CLASS TITLE: CONVENTION FACILITIES ASSISTANT MANAGER

CODE: 4130

CHARACTERISTICS OF THE CLASS:

Under direction, acts as principal assistant to the manager in managing, maintaining and leasing convention facilities; exercises supervision over a group of skilled and unskilled subordinates engaged in general maintenance, custodial care and installation of equipment for such facilities; and performs related duties as required.

Requires responsibility for carrying out, interpreting, enforcing and explaining policy, methods and procedures relating to the operation, maintenance and promotion of convention facilities; preventing moderate losses through the safeguarding of equipment and facilities and the supervision of the observance of safety regulations and rules; making regular contacts with organizations and their representatives for the purpose of explaining services and activities of the convention facilities and furnishing and obtaining information regarding the use of such facilities; preparing and maintaining ordinary operating personnel and financial records and reports.

EXAMPLES OF DUTIES:

1. Assists the manager in the leasing, management and maintenance of all convention facilities; cooperates with show managers and promoters in setting up installations for shows.
2. Plans personnel requirements to service trade shows, conventions, concerts, dances, sports and other activities; keeps time of subordinates and hires temporary help as needed.
3. Supervises the installation of the stage, elevated seats and the setting up of chairs for shows; supervises the moving in, operation, and moving out of shows and inspects facilities to see that they are not damaged and for compliance with fire and safety laws during shows.
4. Prepares contracts for the use of the facilities; collects rents and corresponds with potential tenants regarding use and rental rates for facilities; prepares ordinary rental application and lease agreements.
5. Supervises electricians, carpenters, painters, elevator operators and janitorial staff in the maintenance of the convention facilities; orders supplies and keeps inventory of supplies and equipment.
6. Confers with staff and supervisor regarding general activities and future planning; inspects facilities to check on conditions and building operations.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of high school, supplemented by at least five years of responsible building maintenance and custodial service experience, including two years of supervisory experience; or an equivalent combination of training and experience.

CLASS TITLE: CONVENTION FACILITIES ASSISTANT MANAGER
(continued)

CODE: 4130

Knowledge, Abilities and Skills: Requires good knowledge of: building maintenance and the cleaning of related equipment and supplies; the techniques and procedures involved in the installation of stage, elevated seats, and other convention equipment; the various codes involved in fire and safety regulations for a large convention facility.

Requires ability to: prepare routine rental applications and lease agreements; meet with and deal effectively, courteously and tactfully with prospective tenants; assign and supervise the work of subordinates.

PROMOTIVE LINES:

To: Convention Facilities Manager

From: Original entrance examination

CHARACTERISTICS OF THE CLASS:

Under general administrative direction, supervises and is responsible for the management, leasing and maintenance of convention facilities, including the Civic Auditorium and Brooks Hall; directs a staff engaged in maintenance and custodial activities and services; meets with convention and trade show managers and committees, representatives of sports activities and other groups in promoting the use of the convention facilities; and performs related duties as required.

Requires responsibility for: carrying out, interpreting, developing, coordinating and enforcing policy, methods and procedures in connection with the promotion and use of convention facilities; preventing losses by supervising the safeguarding and upkeep of equipment and facilities and their proper use; making regular contacts with representatives of outside organizations and groups for the purpose of furnishing and obtaining information and explaining availability of services and facilities, and involving some negotiation work in connection with the rental and leasing of convention facilities; checking and reviewing operational, financial and personnel records and reports.

EXAMPLES OF DUTIES:

1. Directs and supervises the leasing, management and maintenance of the convention facilities, including the Civic Auditorium and Brooks Hall; corresponds with representatives of shows and conventions to describe facilities and supplies other data that would influence them in selecting San Francisco for their meetings; meets with advance convention committees to outline the advantages offered, negotiates and prepares the necessary rental applications and lease agreements and maintains accurate record of all bookings.

2. Supervises the collection of all revenues including payments of damages caused by lessees; supervises the operation of the building concessionaire and checks the figures in his monthly report to the city.

3. Supervises the observance of all laws relating to public safety, including the inspection of all floor plans and layouts of events for approval and review by the fire department.

4. Develops the use of the convention facilities for such other events as sports activities, circuses, concerts, auto shows, fraternal and religious meetings, festivals and various other events which promote the welfare, education and entertainment of the public.

5. Directs the preparation of annual budget estimates and recommends necessary capital improvements; supervises the preparation of timeroles and requisitions and makes reports thereon; assembles data and statistics and prepares reports of convention facilities, operations and activities.

CLASS TITLE: CONVENTION FACILITIES MANAGER (continued) CODE: 4132

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of a four year college or university, with a baccalaureate degree, with major course work in business administration or a closely related field.

Requires five years of progressively responsible office, accounting and business management experience, preferably including substantial public relations experience; or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Requires good knowledge of: principles of administration, organization and management; contracts, leases and other agreements; the codes affecting fire and safety of large facilities used by public shows and conventions; all types of conventions, sports and other groups and organizations interested in the use of a convention facility; building management and maintenance.

Requires ability to: deal courteously, effectively and tactfully with outside groups and representatives in establishing good public relations; make sound judgments and recommendations as to rental and leasing of facilities; direct and supervise the work of subordinates; prepare clear, concise and accurate reports on operations and on recommendations for capital improvements.

PROMOTIVE LINES:

To: No normal line of promotion.

From: Convention Facilities Assistant Manager
Original Entrance Examination

**CITY AND COUNTY OF SAN FRANCISCO
DEPARTMENT OF HUMAN RESOURCES**

JOB CODE TITLE: REAL PROPERTY OFFICER

JOB CODE: 4140

DEFINITION:

Under general direction, Real Property Officers perform difficult appraisal, negotiation, and property management work in connection with the acquisition, sale, or lease of all types of real property; prepare agreements, documents, and legislation for real property related matters. The Real Property Officer is responsible for carrying out, interpreting, and coordinating existing policies, methods, and procedures of the Real Estate Department in the acquisition, management and leasing of real estate for various City agencies; preparing difficult appraisals in determining fair market value; committing an agency or department to expenditures of large amounts of money for real estate related activities; making personal contacts with departmental representatives and the general public involving discussion, explanation, and interpretation of policies; preparing, checking, and reviewing detailed and complex technical real property records and reports; and perform related duties as required.

DISTINGUISHING FEATURES:

The 4140 Real Property Officer is a journey level position in this series. It is distinguished from the 4142 Senior Real Property Officer by the latter's supervisory responsibility.

SUPERVISION EXERCISED: None

EXAMPLES OF IMPORTANT AND ESSENTIAL DUTIES:

According to the Civil Service Commission Rule 9, the duties specified below are representative of the range of duties assigned to the 4140 Real Property Officer and are not intended to be an inclusive list.

1. Makes detailed appraisals of all types of real property, with the use of a motor vehicle, for the acquisition, sale or lease by the City and County, including part-take appraisal, highest and best use determination, and the appraisal of easement.
2. Interpretes maps and building plans, makes field inspection with the use of a motor vehicle, and prepares detailed reports thereon.
3. Prepares necessary agreements and contracts; negotiates with owners and their representatives, attorneys, and public agencies for the purchase, lease or sale of property.
4. Manages property of all types, prepares leases and coordinates tenant improvement build-outs of City-owned property or private property for City use; coordinates and manages the maintenance of city-owned buildings; and coordinates and implements the bid process for public bidding on the sale, lease or development of City real property.
5. Coordinates with City Attorney, other City departments, and other public agencies in the preparation of condemnation proceedings, and may act as an expert witness giving testimony on fair market value; hires independent appraisers to assist the City attorney.
6. Reviews land titles and title reports in order to clear imperfect titles.
7. Prepares resolutions and ordinances for boards and commissions pertaining to real estate activities such as acquisitions, sales, leases, claims, transfers of jurisdiction and similar transactions; processes escrows, examines titles, issues escrow instructions, prepares deeds, leases and contracts.

JOB RELATED AND ESSENTIAL QUALIFICATIONS:

Knowledge of: property valuation procedures, concepts and techniques; real estate law, codes, regulations and procedures; and commercial leasing and property management practices and procedures.

Ability to: communicate effectively orally and in writing, including the ability to interpret and explain policies and to conduct difficult negotiations; interact effectively, courteously and tactfully with property owners, agents, representatives of outside organizations and the general public; ability to operate a motor vehicle safely within the State of California.

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EXPERIENCE AND TRAINING GUIDELINES:

Experience and Training:

1. Possession of a Baccalaureate degree from an accredited four-year college or university with courses in real estate law, property appraisal, economics, finance and statistics; **AND**
2. Three (3) years of verifiable experience in the appraisal, purchase, lease and sale of real property as a right-of-way agent, property officer or real estate appraiser with a public agency, a real estate appraiser, a commercial property manager or a commercial real estate broker or agent. Residential and multi-unit residential experience only will not qualify you for this examination;

AND

3. Possession of a valid driver's license.

Effective date: 1/12/61

Amended date: 11/5/99

Reason for amendment: To accurately reflect the current tasks, knowledge, skills and abilities defined in the most recent job analysis conducted for this job code.

**CITY AND COUNTY OF SAN FRANCISCO
DEPARTMENT OF HUMAN RESOURCES**

JOB CODE TITLE: SENIOR REAL PROPERTY OFFICER

JOB CODE: 4142

DEFINITION:

Under general direction, the Senior Real Property Officer supervises real property officers in the performance of technical appraisal and negotiation work in connection with the acquisition, lease or sale of real property; and may be assigned the responsibility for a major land acquisition or lease project. The Senior Real Property Officer is responsible for carrying out, interpreting, and coordinating existing policies, methods, and procedures of the Real Estate Department in the acquisition, management and leasing of real estate for various City agencies; preparing difficult appraisals in determining fair market value; committing an agency or department to expenditures of large amounts of money for real estate related activities, making personal contacts with departmental representatives and the general public involving discussion, explanation, and interpretation of policies; preparing, checking, and reviewing detailed and complex technical real property records and reports; the overall supervision of the preparation and analysis of technical records, reports, and documents dealing with property acquisition, sale and leasing activities and functions.

DISTINGUISHING FEATURES:

The 4142 Senior Real Property Officer is the first supervisory level in the Real Property Officer series. It is distinguished from the Real Property Officer by its supervisory responsibility. It is distinguished from the 4143 Principal Real Property Officer in that the latter supervises the former in the more difficult appraisal and negotiation assignments and serves as principal advisor in real estate matters to departments where assigned.

SUPERVISION EXERCISED: Exercises supervision over 4140 Real Property Officers.

EXAMPLES OF IMPORTANT AND ESSENTIAL DUTIES:

According to the Civil Service Commission Rule 9, the duties specified below are representative of the range of duties assigned to the 4142 Senior Real Property Officer and are not intended to be an inclusive list.

1. Plans, schedules and supervises the work of Real Property Officers engaged in appraisals, negotiations and other related duties for the leasing, acquisition or sale of property or property rights; may train subordinate real property officers in departmental procedures, including instruction on the Administrative Code and City Charter.
2. Personally appraises and negotiates complex acquisitions and lease agreements; assists subordinate agents in the more difficult appraisal and negotiation assignments; coordinates and implements the bid process for public bidding on the sale, lease or development of City real property, supervises the handling of escrow and instructions to title companies.
3. Engages the services of independent appraisers, outside consultants and other real estate experts; reviews and correlates these reports; may appear as an expert witness in cases involving the determination of fair market value.
4. Reviews land titles and title reports in order to clear imperfect titles.
5. Supervises the preparation of reports for presentation to officers of other City departments on matters regarding the acquisition, lease or sale of real property rights related to departmental activities.
6. Prepares resolutions, ordinances, deeds and other documents necessary to implement the acquisition, lease or sale of real property.
7. Supervises the preparation and maintenance of departmental records, reports, files and statistics relative to City-owned property.
8. Confers with City Attorney, engineers, architects, and outside consultants in the conduct of all of the above.

JOB RELATED AND ESSENTIAL QUALIFICATIONS:

Knowledge of: property valuation procedures, concepts and techniques; real estate law, codes, regulations and procedures; and commercial leasing and property management practices and procedures.

Ability to: communicate effectively orally and in writing, including the ability to interpret and explain policies and to conduct difficult negotiations; interact effectively, courteously and tactfully with property owners, agents, representatives of outside organizations and the general public; supervise, plan and direct the work of subordinate real property officers.

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and processing or real estate documents, reports and records; ability to operate a motor vehicle safely within the State of California.

EXPERIENCE AND TRAINING GUIDELINES:**Experience and Training:**

1. Possession of a Baccalaureate degree from an accredited four-year college or university with courses in real estate law, property appraisal, economics, finance and statistics; **AND**
2. Five (5) years of verifiable experience in the appraisal, purchase, lease and sale of real property as a right-of-way agent, property officer or real estate appraiser with a public agency, a real estate appraiser, a commercial property manager or a commercial real estate broker or agent. Residential and multi-unit residential experience only will not qualify you for this examination;

AND

3. Possession of a valid driver's license.

Effective date: 1/12/61

Amended date: 11/5/99

Reason for amendment: To accurately reflect the current tasks, knowledge, skills and abilities defined in the most recent job analysis conducted for this job code.

**CITY AND COUNTY OF SAN FRANCISCO
DEPARTMENT OF HUMAN RESOURCES**

JOB CODE TITLE: PRINCIPAL REAL PROPERTY OFFICER

JOB CODE: 4143

Definition: Under general direction, the incumbent is responsible for supervising a group of real property officers and senior real property officers in the performance of technical appraisal and negotiation work in connection with the acquisition, property management, leasing and sale of real property; may be assigned the responsibility for a major land acquisition or lease project; performs appraisal and negotiation work involving very large and complex acquisitions and lease agreements; coordinates and interprets policy, procedures and methods relating to the acquisition of all types of real property and assists in originating overall office policy on such matters; commits an agency or department to large expenditures of money for real estate related activities; handles difficult inter-personal relationships in dealing with a wide variety of responsible people in discussing, explaining and interpreting policies, rules and regulations; establishes good public relations in conducting difficult negotiations concerning the acquisition, property management and/or lease of all type of property; the overall supervision of the preparation and analysis of technical records, reports and documents dealing with property acquisition, sale, property management and leasing activities and functions; and performs related duties as required.

Distinguishing Features: Incumbents of this job code assist in the overall administration and operation of the Real Estate Department or real estate activities of other City departments. Principal Real Property Officers report to the Assistant Director and Director of Property for administrative and technical direction and may also receive policy direction from departments for whom they act as agents in real estate matters. This job code is distinguished from the Senior Real Property Officer in that the former supervises the latter in the more difficult appraisal and negotiation assignments and serves as principal advisor in real estate matters to departments where assigned.

Supervision Exercised: A position in job code 4143 Principal Real Property Officer, which is the second level supervisor code in the series, assigns, supervises and reviews the work and duties of subordinate employees which include real property officers and senior real property officers; and performs other related duties.

Examples of Important and Essential Duties: According to Civil Service Commission Rule 9, the duties specified below are representative of the range of duties assigned to this job codes and are not intended to be an inclusive list.

1. Plans, schedules, assigns and supervises the work of Senior Real Property officers and Real Property Officers and general office personnel conducting all types of property acquisition, sale, leasing and management; reviews work assignment prepared by subordinate real property officers and outside consultants.
2. Personally appraises and negotiates major and more complex acquisitions and lease agreement with the use of a motor vehicle; assists subordinate Real Property Officers in a motor vehicle; assists subordinate Real Property Officers in a more difficult appraisal and negotiation assignments.
3. Supervises the preparation of escrows and instructions to the title companies; coordinates and implements the bid processes for sale, lease or development of City real property and the razing and clearing of acquired properties, the management of city-owned building, and the preparation of maps, plans, exhibits and reports.
4. Analyzes, leases, permits, agreements, options, deeds and contracts and makes recommendations to the Assistant Director of Property, the Director of Property and other City departmental representatives.
5. Reviews land titles and title reports in order to clear imperfect titles.

DOCUMENTS DEPT.

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SAN FRANCISCO

JOB CODE TITLE: PRINCIPAL REAL PROPERTY OFFICER**JOB CODE: 4143**

6. Confers with the public, other City departmental representatives, attorneys, engineers and others on matters regarding the acquisition, sale, lease or management of real property.
7. Supervises subordinate Real Property Officers and other personnel in the preparation and maintenance of departmental records, files statistical data; may train subordinate Real Property Offices in departmental procedures and interpretation of the Administrative Code and City Charter.
8. Acts as department representative and as a representative of other city governments to boards commissions agencies, and community groups.
9. Supervises review of surety boards, public liability and property damage and fire insurance policies required under lease agreements.
10. Assists management in the preparation of budget estimates for the Real Estate Department.
11. Prepares and presents quarterly and annual reports and supervises the preparation and presentation of quarterly and annual reports to boards, commissions and the Mayor on departmental activities.

Job Related and Essential Qualifications:

Knowledge of: property valuation procedures, concepts and techniques; real estate law, codes, regulations and procedures; and commercial leasing and property management practices and procedures.

Ability to: communicate effectively orally and in writing; interact effectively, courteously and tactfully with property owners, agents, representatives of outside organizations and the general public; supervise, plan and direct the work of subordinate real property officers; develop policy; and to assist in the administration and operation of the Real Estate Department or the real estate activities of other City departments.

Experience and Training Guidelines:

1. Possession of a Baccalaureate degree from an accredited four-year college or university with courses in real estate law, property appraisal, economics, finance, or statistics; **AND**
2. Six (6) years of verifiable experience in the appraisal, purchase, lease and sale of real property as a right-of-way agent, property officer or real estate appraiser with a public agency, a real estate appraiser, a commercial property manager or a commercial real estate broker or agent. Residential and multi-unit residential experience only will not qualify you for this examination; two year of this experience must have been supervising staff, projects or functions; **AND**
3. Possession of a valid driver's license.

Note: Up to two (2) years of additional qualifying work experience may be used to substitute for qualifying education on a year-for-year basis. Employees must use own car for business purposes (employees will be reimbursed).

Effective Date: 10/19/87

Amended Date: 11/5/99

Reason for Amendment: To accurately reflect the current tasks, knowledge, skills and abilities defined in the most recent job analysis conducted for this job code.

CLASS TITLE: ASSISTANT DIRECTOR OF PROPERTY

CODE: 4114

CHARACTERISTICS OF THE CLASS:

Under general administrative direction, acts as principal assistant to the director of property in the proper administration of the real estate department, including the control and management of all convention facilities; exercises direction through subordinate supervisory personnel over a technical and clerical staff engaged in the appraisal, acquisition and leasing of real property for various city and county agencies and departments; assists in directing the control, management and sale of real property owned or leased by the city; acts for the director in his absence; and performs related duties as required.

Requires major responsibility for: developing, coordinating, originating and executing policies, methods and procedures and assisting in the overall administration of the real estate department; achieving major economies in connection with commitments of large expenditures of money based on evaluation of fair market values; making contacts with administrative officials, representative groups and legislative bodies involving discussions, explanations and interpretations of policies, rules and regulations and involving difficult negotiations and presentations of highly specialized and most complex real property acquisition problems; requires overall supervisory responsibility for the preparation, checking and review of important detailed and highly complex technical real property acquisition records and reports.

EXAMPLES OF DUTIES:

1. Directs, through subordinate supervisory personnel, right-of-way agents and general office personnel engaged in conducting all types of property acquisition, including those of a difficult and highly complex nature.

2. Analyzes leases, agreements, options, deeds and contracts and makes recommendations to the director as to the formulation of policy and legislation requirements.

3. Confers with public property owners, other city department heads, attorneys, and engineers concerning all types of real estate transactions.

4. Reviews the more difficult and specialized acquisition problems and makes decisions as to proper action to be taken.

5. When directed, attends meetings of the board of supervisors, its committees and various commissions to explain, interpret and make recommendations on property acquisition policy.

6. Consults with, instructs and makes decisions for right-of-way personnel regarding office and field work activities.

7. Confers with responsible representatives of other departments and the city attorney's staff in the preparation of proceedings for legal action to be taken in connection with the purchase and lease of real estate, the sale and lease of surplus lands and sites for off-street parking.

8. Assists in directing the control and management of convention facilities and major parking projects.

CLASS TITLE: ASSISTANT DIRECTOR OF PROPERTY (continued) CODE: 4144

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of a four year college or university, with a baccalaureate degree, preferably with major course work in civil or construction engineering, supplemented by special courses in real property appraisal.

Requires seven years of progressively responsible real property appraisal and acquisition negotiation experience, including three years of responsible supervisory experience; or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Requires comprehensive knowledge of: the laws pertaining to the securing of rights of way, the factors involved in appraising property and the principles underlying the appraisal process; property values and the effect of economic trends upon value and price; condemnation and real property law, and the effects on property values of deed and tract restrictions, zoning ordinances, set-backs, tax and improvement assessments, easements and encroachments; the methods of describing real property; the principles of organization and administration.

Requires considerable ability to: plan, organize and direct the work of a right-of-way and general office staff; conduct successful right-of-way negotiations of a highly specialized and complex nature and analyze situations and adopt effective courses of action in connection with highly complex and specialized property acquisition problems; prepare clear, concise and effective reports on complex real property acquisition matters.

PROMOTIVE LINES:

To: Director of Property

From: Senior Right-of-Way Agent

SAN FRANCISCO CIVIL SERVICE COMMISSION

CLASS TITLE: DIRECTOR OF PROPERTY

CODE: 4150

CHARACTERISTICS OF THE CLASS:

Subject to top management approval, has charge of and is responsible for the proper administration of the real estate department including the control and management of all convention facilities; exercises direction through subordinate supervisory personnel over a technical and clerical staff engaged in the appraisal, acquisition and leasing of real property for various city and county agencies and departments; directs the control, management and sale of real property owned or leased by the city; and performs related duties as required.

Requires major responsibility for: coordinating, approving and executing policy and methods affecting all activities and functions of the real estate department; achieving widespread economies and/or preventing widespread losses through efficiently committing the real estate department to expenditures of large amounts of money; making contacts to establish and maintain public relations frequently involving difficult and complex negotiations, presentations, and interpretations of policies, rules and regulations with administrative officials, representative groups and legislative bodies on specialized real property acquisition and management problems; directing the preparation, review and maintenance of records and reports affecting highly specialized property acquisition and management activities and drawing conclusions therefrom upon which administrative decisions are based.

EXAMPLES OF DUTIES:

1. Administers, through subordinate supervisory personnel, the acquisition and sale of all real property and improvements required by city and county agencies and departments.
2. Conducts negotiations through right-of-way staff for the purchase and sale of land involving large amounts of money and is responsible for all real estate matters of the city and county, including such matters at locations outside the county limits; directs appraisals of major projects, such as redevelopment areas or freeways.
3. Advises the board of supervisors, public utilities commission, board of education and other interested departments in the proper conduct of their real estate affairs, courses of action to be taken, preliminary planning for major projects such as freeways, school sites and airport expansions; advises the board of supervisors, sitting as a board of equalization, on tax complaint investigations.
4. Directs, through subordinate supervisory personnel, control and management of convention facilities and major parking projects.
5. Recommends and advises top city officials relative to the advantageous use, disposition or sale of real property not currently being used.
6. Approves all proceedings in connection with the sale of city-owned property.

CLASS TITLE: DIRECTOR OF PROPERTY
(continued)

CODE: 4150

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of a four year college or university, with a baccalaureate degree, with major course work in civil engineering or architecture, supplemented by special courses in real estate appraisal and property management.

Requires ten years of progressively responsible real property appraisal and acquisition negotiation experience, including five years of responsible supervisory and administrative experience; or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Requires comprehensive knowledge of: the laws pertaining to the securing of rights-of-way, the factors involved in appraising property and the principles underlying the appraisal process; property values and the effect of economic trends upon value and price; condemnation and real property law and the effects on property values of deed and tract restrictions, zoning ordinances setbacks, tax and improvement assessments, easements and encroachments; the common methods of describing real property; organization, management and the principles of administration including personnel management, budgeting and supervision.

Requires considerable ability to: plan, organize and direct the work of an appraisal and property management staff; personally negotiate the most intricate and highly complex property acquisition problems; supervise the management of rental properties; analyze situations and adopt an effective course of action; formulate overall policy and make recommendations thereon to legislative bodies, other departments, and representative groups related to the acquisition and sale of real property.

PROMOTIVE LINES:

To: No normal lines of promotion

From: Assistant Director of Property

SAN FRANCISCO CIVIL SERVICE COMMISSION

CLASS TITLE: REAL PROPERTY LOAN OFFICER

CODE: 4160

CHARACTERISTICS OF THE CLASS:

Under direction, performs financial analysis of loan and grant applications in connection with a Federally Assisted Code Enforcement program; consults with applicants, building inspectors, Federal and City officials, title insurance companies, banks and finance companies in connection therewith; compiles and submits loan or grant documentation and supervises the implementation of approved projects; and performs related duties as required.

Requires responsibility for: carrying out, interpreting, co-ordinating and enforcing laws, policies, methods and procedures relating to the financing and execution of a Federally Assisted Code Enforcement project; personal contacts with individuals, governmental agencies and private companies involving discussion, explanation and interpretation of program policies and procedures; preparing, checking, reviewing and recommending loan or grant applications; reviewing and keeping records of the progress of approved projects.

EXAMPLES OF DUTIES:

1. Reviews loan and grant applications submitted under a Federally Assisted Code Enforcement program; interviews applicants to determine their financial qualifications; verifies all statements made by applicants; analyzes applicant's credit and the project feasibility.

2. Consults with building inspectors regarding building code violations and the cost of correcting deficiencies; reviews bid estimates to determine compliance with Federal and Municipal laws and policies; prepares budget for loan and finance services.

3. Assists applicants in filing normal loan or grant applications; prepares complete documentation in compliance with Federal and City laws, regulations, directives and policies; submits loan or grant recommendations to the Department of Housing and Urban Development.

4. Establishes escrows and instructs title companies as to deposit of funds; supervises disbursement of funds; maintains records of all project transactions; submits reports to Federal and Municipal agencies.

5. Explains and interprets the scope and procedures of a Federally Assisted Code Enforcement program to the general public, loan and grant applicants, escrow and title companies and governmental agencies; consults with the Department of Housing and Urban Development in resolving individual case problems.

6. Reviews new Federal and City directives and procedural bulletins; incorporates amendments and additions into existing manuals; supervises clerical subordinates in the preparation of a variety of reports, correspondence, memoranda and records.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of a four-year college or university with a baccalaureate degree, preferably with major course work in Business Administration, Accounting, or Economics.

Requires four years of progressively responsible experience as a Real Property Loan Officer; or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Requires good knowledge of: Federal, State and Municipal laws, regulations, policies, methods and procedures as they relate to the interpreting, co-ordinating and enforcing of provisions concerning a

CLASS TITLE: REAL PROPERTY LOAN OFFICER
(Continued)

CODE: 4160

Federally Assisted Code Enforcement program; the laws, principles and practices of escrow companies, title services, home building or remodeling financing.

Requires ability to: deal courteously, effectively and tactfully with a variety of governmental agencies and the general public; analyze loan or grant applications and the feasibility of projects and make recommendations thereon; prepare clear and concise reports and correspondence.

License: Requires possession of a valid State motor vehicle operator's license.

PROMOTIVE LINES:

To: No normal lines of promotion

From: Original entrance examination

ADOPTED: 6/1/67

SAN FRANCISCO CIVIL SERVICE COMMISSION

(AMENDED)

CLASS TITLE: ASSESSMENT CLERK

CODE: 4202

CHARACTERISTICS OF THE CLASS:

Under general supervision, performs responsible clerical and public contact work in supplying a variety of services and information to the general public relative to property tax matters; assists in supervising temporary personnel assigned during the tax season; and performs related duties as required.

Requires responsibility for explaining and carrying out existing tax assessment policies and procedures; making regular contacts with the general public, other departments and outside organizations relative to routine property tax assessment matters; checking and reviewing tax declarations and researching records.

EXAMPLES OF DUTIES:

1. Answers personal and telephone requests from the general public concerning information on taxable properties including information on legal descriptions, ownership, assessed evaluations and locations of property.
2. Searches property rolls and a variety of records relative to changes in ownership and transfers of properties; assists taxpayers and representatives of various religious groups in providing general information and assistance on tax matters and tax exemptions.
3. Assists taxpayers in the preparation of property tax declarations and reviews and accepts same.
4. Supervises and instructs temporary clerks in the proper handling of tax declarations.
5. Receives, reviews and replies to a variety of correspondence on tax matters.
6. Processes petitions from property owners to assessment appeals board requesting reconsideration of their property assessment.
7. Prepares real estate documents for electronic data processing.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of high school, supplemented by at least three years of progressively responsible clerical and office experience directly related to property tax work; or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Requires good knowledge of the terms, procedures and techniques used in property appraisal and taxation record keeping; the laws, ordinances and regulations pertaining to personal and real property tax assessment; modern office practices and techniques.

Requires considerable ability to deal effectively and courteously with the general public; analyze requests for information and to provide such information with speed and accuracy; prepare, maintain and research a variety of detailed records relative to tax assessment work.

PROMOTIVE LINES:

To : To be determined

From: Original entrance examination

Amended: 10/1/73



SAN FRANCISCO CIVIL SERVICE COMMISSION

CLASS TITLE: SENIOR ASSESSMENT CLERK

CODE: 4203

CHARACTERISTICS OF THE CLASS:

Under general supervision, directs and coordinates the work of a small clerical support staff engaged in clerical assessment work; performs complex and responsible technical and public contact work relative to property tax matters; and performs related duties as required.

DISTINGUISHING FEATURES:

Positions in this class are responsible for providing lead direction over a small clerical staff engaged in specialized clerical assessment work. Incumbents in this class also perform the more complex and responsible clerical assessment work requiring knowledge and application of assessment laws, regulations and procedures. This class is distinguished from the next lower class of Assessment Clerk by its supervisory responsibility and responsibility for performing the more difficult assessment work assignments.

EXAMPLES OF DUTIES:

"THE CLASS SPECIFICATIONS SHALL BE DESCRIPTIVE OF THE CLASS AND SHALL NOT BE CONSIDERED AS A RESTRICTION ON THE ASSIGNMENT OF DUTIES NOT SPECIFICALLY LISTED." (CSC RULE 7)

1. Assigns, supervises and reviews the work of subordinate Assessment Clerks and general clerical personnel performing specialized clerical assessment work.
2. Supervises and participates in the maintenance of a large variety of detailed clerical records, reports and similar materials.
3. Compiles and condenses technical and statistical data from various sources involving the application of relevant rules and regulations governing such activities.
4. Searches property rolls and a variety of records relative to changes in ownership and transfers of properties; assists taxpayers and representatives of various religious groups by providing general information and assistance on tax matters and tax exemptions.
5. Receives, reviews and replies to a variety of correspondence on tax matters.
6. Prepares real estate documents for electronic data processing.
7. Posts a variety of information and data in connection with the maintenance of office records; codes correspondence for files; assembles materials and information from various sources relative to the typing of a variety of reports.
8. Checks and reviews a variety of documents for sufficiency and conformance to established standards and requirements.

QUALIFICATIONS:

"THE EXAMINATION ANNOUNCEMENT SHALL PROVIDE THE QUALIFICATIONS...AND OTHER PARTICULARS...APPLICANTS MUST BE GUIDED SOLELY BY THE ANNOUNCEMENT OF THE EXAMINATION FOR WHICH THEY APPLY." (CSC RULE 9)

Knowledge, Abilities and Skills: Good knowledge of the terms, procedures and techniques used in property appraisal and taxation record keeping; the laws, ordinances and regulations pertaining to personal and real property tax assessment; modern office practices and techniques.

Considerable ability to: direct, assign and review the work of others; use good judgement in making routine decisions in accordance with existing laws, ordinances, regulations and departmental policies and procedures; establish and maintain satisfactory working relationships with departmental personnel and the public; use calculators and other office machines; type simple forms and schedules.

#0075b

ADOPTED: October 21, 1985

SAN FRANCISCO CIVIL SERVICE COMMISSION

CLASS TITLE: VETERANS ASSESSMENT SERVICES SUPERVISOR

CODE: 4206

CHARACTERISTICS OF THE CLASS:

Under general direction, is responsible for processing veterans claims for personal and real property tax exemption; supervise the activities of subordinate employees engaged in such work; and performs related duties as required.

Requires responsibility for interpreting and carrying out existing laws and regulations relating to veterans exemptions from personal and real property taxes; making regular contacts with the general public, representatives of outside agencies, groups and others relative to claims and information regarding veterans exemptions; preparing and reviewing detailed records and papers in connection with veterans tax exemption claims.

EXAMPLES OF DUTIES:

1. Supervises and participates in the clerical procedures and processes necessary to veterans claims for exemption from personal and real property taxes as provided by law.
2. Interviews exemption claimants and provides information and assistance necessary to the filing of exemption claims; instructs seasonal and regular employees in the processes and regulations governing the filing of such claims.
3. Verifies title records to real property and evidence of satisfactory military services and other evidence necessary to the qualification for tax exemption.
4. Prepares and supervises the preparation of records, correspondence and reports relating to veterans claims.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of high school, supplemented by at least four years of progressively responsible clerical and office experience, including one year of supervisory experience; or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Requires considerable knowledge of revenue and taxation code and related laws, ordinances and regulations pertaining to veterans tax exemptions; good knowledge of modern office operation techniques and methods.

Requires ability to organize and supervise the work of subordinate personnel; deal effectively and tactfully with the general public; review and analyze tax exemption claims for accuracy and sufficiency.

PROMOTIVE LINES:

To: Personal Property Records Supervisor
Real Property Records Supervisor

From: Principal Clerk

(Retitles and Amends)

Retitles B235 Director of Service, Assessor's Office
 Abolishes 4206 Veterans Assessment Services Supervisor
 Abolishes 4208 Assessment Services Supervisor

CLASS TITLE: DIRECTOR OF ASSESSMENT SERVICES

CODE: 4207

Under direction, is responsible for all informational property tax services to the general public and outside agencies, including the processing of all types of statutory exemptions from the property tax; plans, assigns and supervises the activities of subordinate personnel engaged in such work; and performs related duties as required.

Requires responsibility for carrying out, interpreting and explaining existing methods and procedures relative to tax assessment and exemption problems and information; making regular contact with the general public, other departmental personnel and representatives of outside organizations in connection with tax assessment and exemption problems; preparing, checking and reviewing detailed work papers and reports on tax assessments and exemption matters.

EXAMPLES OF DUTIES:

1. Supervises and participates in the processing of claims for tax exemptions for churches; cemetery associations, orphanages, educational institutions and welfare exemption claims as directed by the State Board of Equalization.
2. Supervises the processing of veteran's claims for exemption from personal and real property taxes; the homeowner's claim for exemption as prescribed by law.
3. Supervises and participates in the activities of the Division of Public Information and Service; supplies a wide variety of information and services on property tax matters to taxpayers, city, state and federal agencies and the general public.
4. Prepares detailed correspondence, reports and statistical data for the general public, outside agencies and departmental personnel relating to inquiries and information on property tax and exemption matters.
5. Prepares reports on claims for refunds and cancellations referred to the Public Information and Services Division from the Board of Supervisors and the City Attorney's Office.
6. Assists the City Attorney's Office in investigating property ownership and transfers of title pertaining to legal matters.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of a four-year college or university with a baccalaureate degree, with major course work in accounting, business administration or a related field.

Requires at least six years of progressively responsible auditing or appraisal experience directly related to property assessment work, including two years of supervisory experience; or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Requires considerable knowledge of: Revenue and taxation codes and other ordinances, laws and regulations applicable to tax assessment and exemption matters; the methods and practices used in the appraisal of real and personal property for tax assessment purposes; the overall function of the Assessor's Office; modern office management techniques and methods.

Requires considerable ability to deal with and tactfully handle a variety of sensitive tax assessment and exemption problems with the general public and outside organizations; plan, assign and supervise the work of subordinate personnel; prepare and review detailed documents and records relative to tax assessment matters;

CLASS TITLE: DIRECTOR OF ASSESSMENT SERVICES

CODE: 4207

MINIMUM QUALIFICATIONS: (contd)

Knowledge, Abilities and Skills: (contd)

analyze financial statements and similar documents and to draw logical conclusions therefrom; prepare and supervise the preparation of a variety of detailed reports and records.

PROMOTIVE LINES:

To be determined

ADOPTED: 5/25/70

SAN FRANCISCO CIVIL SERVICE COMMISSION

CLASS TITLE: ASSESSMENT SERVICES SUPERVISOR

CODE: 4208

CHARACTERISTICS OF THE CLASS:

Under direction, is responsible for supervising all activities related to providing a wide variety of services and information to the general public and outside agencies in connection with property tax matters; plans, assigns and supervises the activities of subordinate personnel engaged in such work; and performs related duties as required.

Requires responsibility for carrying out, interpreting and enforcing existing methods and procedures relative to assessment problems and information; making regular contact with the general public, other departmental personnel and representatives of outside organizations in connection with tax assessment and exemption problems; preparing, checking and reviewing detailed work papers and reports on tax assessments and exemption matters.

EXAMPLES OF DUTIES:

1. Supervises and participates in supplying a wide variety of services and information on property tax matters including information on legal descriptions, ownership, assessed valuations and location of property.

2. Reviews complaints of inequities and discrepancies in assessments and makes recommendations for resolving such complaints.

3. Supervises and personally handles the filing of affidavits for specific tax exemptions for churches, cemetery associations, orphanages and educational institutions.

4. Reviews and processes all claims for welfare exemptions filed under provision of revenue and taxation code.

5. Interviews representatives of various organizations and analyzes submitted documents in connection with tax exemption matters.

6. Prepares and supervises the preparation of correspondence dealing with inquiries and information on property tax matters.

7. Prepares and supervises the preparation of detailed reports, work papers and records on property tax matters.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of a four year college or university, with a baccalaureate degree, with major course work in accounting, business administration or a related field.

Requires at least six years of progressively responsible auditing or appraisal experience directly related to property assessment work, including two years of supervisory experience; or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Requires considerable knowledge of: revenue and taxation codes and other ordinances, laws and regulations applicable to tax assessment; the methods and practices used in the appraisal of real and personal property for tax assessment purposes; the overall function of the assessor's office; modern office management techniques and methods.

CLASS TITLE: ASSESSMENT SERVICES SUPERVISOR
(continued)

CODE: 4208

Requires considerable ability to deal with and tactfully handle a variety of sensitive tax assessment problems with the general public and outside organizations; plan, assign and supervise the work of subordinate personnel; prepare and review detailed documents and records relative to tax assessment matters; analyze financial statements and similar documents and to draw logical conclusions therefrom; prepare and supervise the preparation of a variety of detailed reports and records.

PROMOTIVE LINES:

To: Administrative Assistant to the Assessor

From: Personal Property Records Supervisor
Real Property Records Supervisor

SAN FRANCISCO CIVIL SERVICE COMMISSION

CLASS TITLE: ASSISTANT CHIEF, TECHNICAL AND ASSESSMENT SERVICES

CODE: 4210

CHARACTERISTICS OF THE CLASS:

Under direction, assists in directing the preparation of the secured and unsecured assessment rolls; maintains accurate controls on documents relating to assessment rolls; assists in supervising the activities of the assessment services division; assists Chief of Technical Services in coordinating the flow of assessment information between the Assessor's Office, Tax Collector's Office and the Data Processing Sections of the Controller's Office; supervises subordinates; and performs related duties as required.

DISTINGUISHING FEATURES:

This single position classification reports directly to the Chief, Technical and Assessment Services. The Assistant Chief assists in directing all record keeping operations and informational property tax services for the department and supervises employees in various clerical and technical subprofessional engineering classes. This class is distinguished from the Chief, Technical and Assessment Services in that the latter has full responsibility for directing the technical and assessment services of the Assessor's Office.

EXAMPLES OF DUTIES:

1. Assists in directing the processing of a wide variety of assessment records and documents reflecting changes in real property valuation; hand posts changes to control records; prepares reports showing changes in real property valuation for Board of Supervisors, Electronic Data Processing Unit, and other interested City departments.
2. Assists the Chief of Technical Services in coordinating the activities of various record keeping operations in processing assessment data in connection with printing the assessment rolls for each year; may supervise the preparation of block books, field maps and new subdivision maps; acts for the Chief in his absence.
3. Assists in coordinating the work of the Assessor's Office with those responsible for the design and implementation of computer-oriented office systems and procedures.
4. Assists in supervising and participates in the activities of the Assessment Services Division; processes claims for welfare, veterans, homeowners and related exemptions; provides property tax information and services to the public; prepares correspondence, reports and statistical data.
5. Directs the processing of real estate sales documents received daily from the Real Estate Division for batching and forwarding to electronic data processing; directs the processing of documents reflecting changes in property declarations, ownership and address.
6. Supervises the processing of Field Book sheets received from the Personal Property Audit Division for processing to the EDP unit preparatory to compilation of Business Personal Property Statements.
7. Reviews exemption claims for conformity with established regulations; responds to public requests for information in connection with assessment problems.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of a four-year college or university with a baccalaureate degree with major course work in public administration, accounting, business administration, economics or a closely related field, supplemented by special course work in real estate appraisal.



MINIMUM QUALIFICATIONS: (Cont.)

Requires at least two years of progressively responsible experience in one or a combination of the following: Administrative analysis, systems analysis, organization and methods studies, accounting, auditing, or appraisal of real and personal property, including at least one year of supervisory experience; or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Requires general knowledge of: The organization and administration of the Assessor's Office, revenue and taxation codes, laws, ordinances and regulations applicable to assessments; office methods and procedures as they relate to electronic data processing.

Requires ability to: Deal effectively and tactfully with departmental personnel, the general public and representatives of outside organizations; analyze and review detailed assessment documents, tax declarations, work papers and other records in connection with the field of tax assessment.

PROMOTIVE LINES:

TO: 4266 Chief of Technical Services

FROM: 4220 Personal Property Auditor
4261 Real Property Appraiser

ADOPTED: 5-25-70

AMENDED AND RETITLED: 1-19-81

Retitles 4263 Assistant Chief, Technical Services

Abolishes 4207 Director of Assessment Services

Abolishes 4280 Administrative Assistant to the Assessor

SAN FRANCISCO CIVIL SERVICE COMMISSION

CLASS TITLE: CHIEF, TECHNICAL AND ASSESSMENT SERVICES

CODE: 4212

CHARACTERISTICS OF THE CLASS:

Under general direction, is responsible for the direction of the technical services section of the Assessor's Office; supervises the activities of the Assessment Services Division; coordinates assessment information between the Assessor's Office, Tax Collector's Office and the Data Processing sections of the Controller's Office; supervises the activities of subordinate personnel engaged in such work; and performs related duties as required.

DISTINGUISHING FEATURES:

This single-position classification reports directly to the Chief Assistant Assessor and is responsible for directing all record keeping operations and informational property tax services of the Assessor's Office. This classification is distinguished from the next lower class of Assistant Chief, Technical and Assessment Services in that it has full responsibility for technical and assessment services and directs the work of the employee in the latter classification.

EXAMPLES OF DUTIES:

1. Directs the record keeping operations of the Assessor's Office including systems, data processing, property transfer and assessment control divisions.
2. Supervises the preparation of a wide variety of statistical records and reports relative to the preparation of assessment rolls, including corrections to the rolls and processing changes in property declarations and ownerships, including cuts and mergers of real property.
3. Coordinates the activities of various record keeping operations in processing assessment data in connection with printing the assessment rolls for each year; plans, assigns and supervises the preparation of block books, field maps and new subdivision maps.
4. Plans and coordinates systems and procedures for electronic data processing; confers with division heads concerning data flow, preparation of the assessment roll and improvements in methods and procedures.
5. Supervises the activities of the Assessment Services Division, including the processing of claims for welfare, veterans', homeowner's exemptions; provision of public property tax information and services; preparation of correspondence, reports and information on claims for refunds and liaison with other city departments.
6. Interviews the general public and representatives of outside organizations in order to resolve problems and questions concerning specific assessments or exemptions.
7. Coordinates the work of the Assessor's Office with those responsible for the design and implementation of computer-oriented office systems and procedures.
8. Determines eligibility and attaches the lien of personal property on the secured roll.
9. Supervises the maintenance of the master property records and the codification of parcels involved.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of a four year college or university with a baccalaureate degree, with major course work in public administration, accounting, economics, business administration, or a closely related field, supplemented by special course work in real estate appraisal.

MINIMUM QUALIFICATIONS: (Cont.)

Requires at least four years of progressively responsible experience in one or a combination of the following: Administrative analysis, systems analysis, organization and methods studies, accounting, auditing, or appraisal of real and personal property, including at least two years of supervisory experience; or an equivalent combination of training and experience.

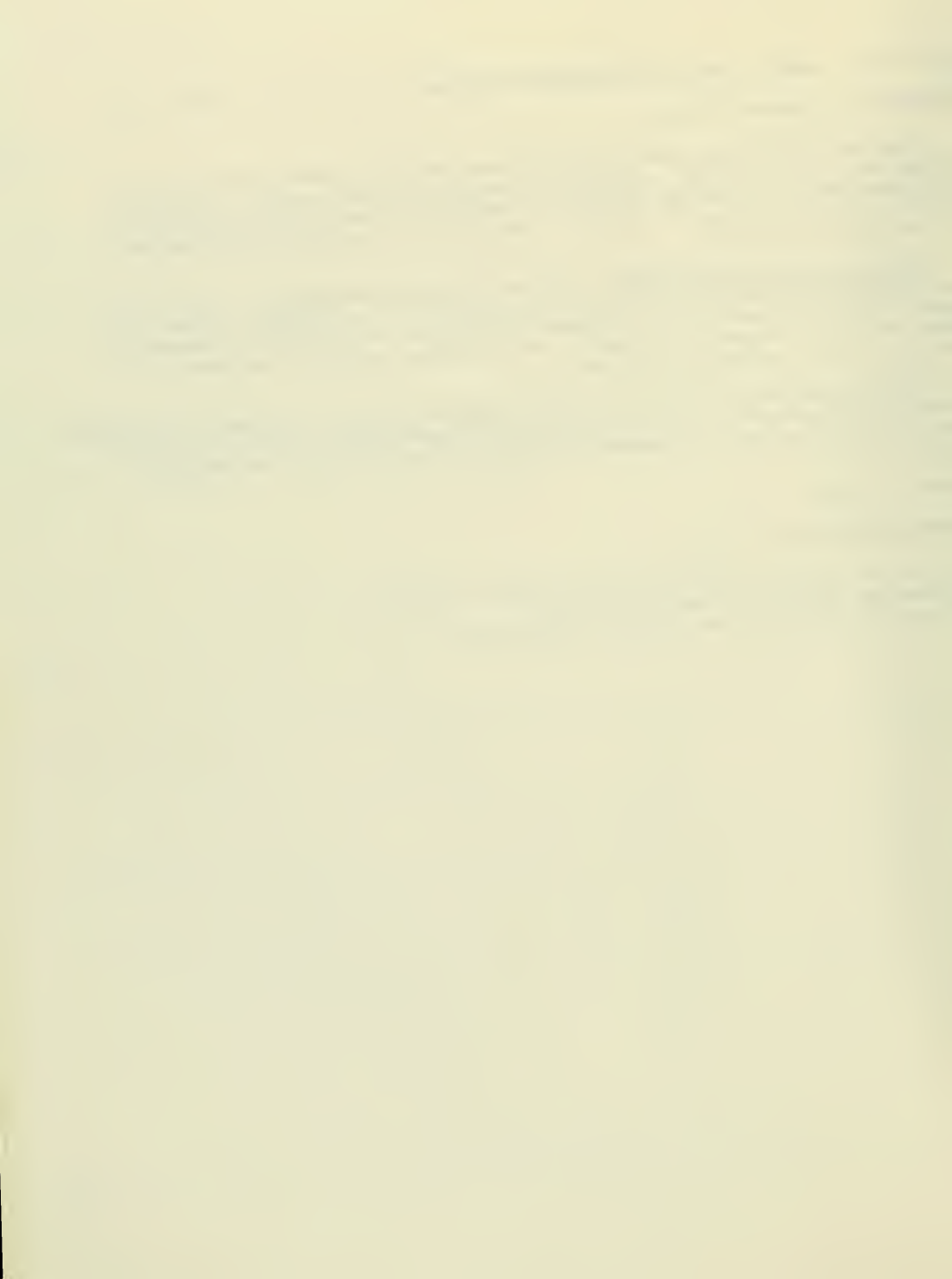
Knowledge, Abilities and Skills: Requires considerable knowledge of: The principles of organization and administration; the operations of the Assessor's Office; the revenue and taxation codes, laws, ordinances and regulations applicable to assessments; modern office methods geared to automatic data processing techniques, machines, and knowledge of civil engineering drafting.

Requires considerable ability to: Plan, assign and supervise the work of subordinate personnel; deal effectively and tactfully with the general public; analyze and review detailed tax declarations, work papers and records in connection with tax assessment matters.

ADOPTED: 4-26-68

AMENDED AND RETITLED: 1-19-81

Retitles 4266 Chief of Technical Services, Assessor's Office
Abolishes 4207 Director of Assessment Services
Abolishes 4280 Administrative Assistant to the Assessor



CLASS TITLE: PERSONAL PROPERTY RECORDS SUPERVISOR

CODE: 4214

CHARACTERISTICS OF THE CLASS:

Under direction, is responsible for the preparation of the personal property assessment roll and the maintenance of all related records; supervises the work of subordinate personnel engaged in such work; and performs related duties as required.

Requires responsibility for interpreting, carrying out and enforcing existing methods and procedures relative to the preparation of personal property tax rolls; making regular contact with the general public, other departmental personnel and outside organizations relative to personal property tax assessment matters; checking and reviewing detailed statements and records necessary to the preparation and maintenance of personal property tax rolls.

EXAMPLES OF DUTIES:

1. Plans and organizes activities necessary to the preparation of annual personal property tax rolls, including the preparation of instructions and manuals for training of temporary clerical and field staff members.
2. Personally conducts a school of instruction to advise temporary employees of field and office procedures during the assessment season.
3. Supervises the delivery of official demands and the filing of declarations by taxpayers.
4. Reviews and adjusts complaints and differences between taxpayers and office personnel.
5. Prepares and supervises the preparation of reports and records pertaining to the preparation of personal property tax rolls and penal assessment rolls.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of high school, supplemented by five years of progressively responsible clerical and office experience in connection with tax assessment work, including two years of supervisory experience; or an equivalent combination of training and experience.

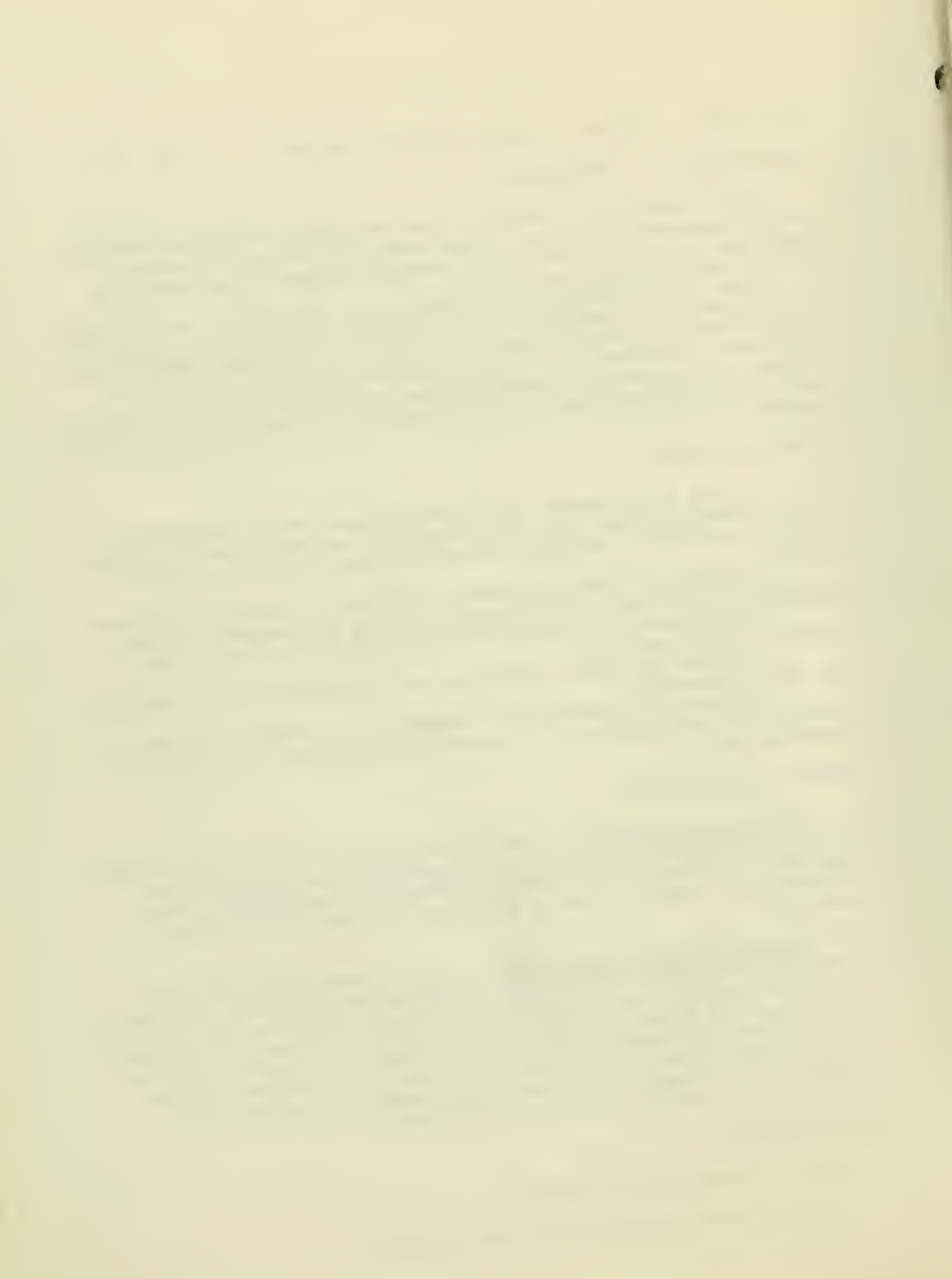
Knowledge, Abilities and Skills: Requires considerable knowledge of revenue and taxation codes, laws, ordinances and regulations applicable to personal property tax assessment; the principles and practices used in the appraisal of personal property; modern office techniques and methods.

Requires considerable ability to plan, assign and supervise the work of subordinate office and field personnel; review and analyze detailed statements, work papers and records on tax assessment matters; deal effectively and tactfully with the general public.

PROMOTIVE LINES:

To: No normal lines of promotion.

From: Veterans Assessment Services Supervisor



CIVIL SERVICE COMMISSION OF SAN FRANCISCO

CLASS TITLE: PERSONAL PROPERTY AUDITOR

CODE: 4220

CHARACTERISTICS OF THE CLASS:

Under general supervision, is responsible for inspecting, analyzing and evaluating personal property holdings of business firms for tax assessment purposes; may audit accounting and related records to verify accuracy of returns made under the Hotel Transient Tax Ordinance; and performs related duties as required.

Requires responsibility for: carrying out and explaining existing auditing procedures and methods in connection with personal property assessment activities; making regular contacts with the general public and representatives of business and commercial firms relative to tax assessment activities; preparing, checking and reviewing detailed financial and operational records and reports in connection with tax assessment activities.

EXAMPLES OF DUTIES:

1. Examines and audits accounting records, financial statements and related documents of industrial and commercial business firms in connection with the assessment of personal property taxes prescribed by law.
2. Inspects and appraises personal property including merchandise, industrial machinery, office equipment and leasehold improvements, and reconciles financial records and other related data.
3. Adjusts inventories for purchases, fabrications, processing and sales between last inventory data and the tax assessment date.
4. Reviews and discusses audit findings with property owners or their representatives.
5. Assists tax payers filing tax declarations in the Assessor's office in completing their declarations, and answers questions on personal property tax matters.
6. Supervises and instructs temporary clerks, during the assessment period, in the distribution of property tax demands and completion of demand notices during the filing season.
7. Examines books, accounts and supporting records relative to the purchase and use tax returns of tax payers and establishes tax liability or refunds.
8. Reviews probate inventories to ascertain the portion of such inventories which are subject to personal property tax.
9. Examines and assesses personal property stored in commercial warehouses; prepares work papers and reports of field auditing activities.
10. May examine and audit accounting records, financial statements and related documents of hotels, motels and other guest houses in connection with the administration of the Hotel Transient Tax Ordinance.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of a four year college or university, with a baccalaureate degree, with major course work in accounting; or an equivalent combination of training and experience.

CLASS TITLE: PERSONAL PROPERTY AUDITOR
(Continued)

CODE: 4220

Knowledge, Abilities and Skills: Requires knowledge of: the methods and practices used in auditing accounting and financial records; revenue and taxation codes pertaining to the assessment of personal property.

Requires ability to: audit and appraise personal property; analyze financial and accounting data and draw logical conclusions therefrom; maintain cooperative and effective relationships with the general public; prepare accurate and concise work papers and reports on auditing activities.

Requires skill in the application of accounting and auditing techniques to practical field problems.

License: Requires possession of a valid state motor vehicle operators license.

PROMOTIVE LINES:

To: Senior Personal Property Auditor

From: Original Entrance Examination

Amended: 5/10/62

**CITY AND COUNTY OF SAN FRANCISCO
DEPARTMENT OF HUMAN RESOURCES**

JUN - 5 2000

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JOB CODE TITLE: SENIOR PERSONAL PROPERTY AUDITOR

JOB CODE: 4222

Business Unit: COMM

DEFINITION: Under general supervision in the Assessor/Recorder's Office or the Treasurer/Tax Collector's Office, the Senior Personal Property Auditor works both in the field and the office examining, analyzing and evaluating accounting, financial and operational records and documents, and/or personal property and fixtures in connection with the administration of personal property tax, business tax, payroll expense tax and other taxes administered by these departments.

DISTINGUISHING FEATURES: This class is distinguished from 4224 Principal Personal Property Auditor in that incumbents in the latter class exercise full supervision over subordinate staff. It is distinguished from 4220 Personal Property Auditor in that incumbents in Class 4222 examine and analyze more difficult and complex accounting, financial and operational records and documents, and/or personal property and fixtures of large commercial and industrial establishments.

SUPERVISION EXERCISED: May serve as lead worker to professional staff and act as supervisor in absence of Principal Auditor.

EXAMPLES OF IMPORTANT AND ESSENTIAL DUTIES:

According to Civil Service Commission Rule 9, the duties specified below are representative of the range of duties assigned to this job code/class and are not intended to be an inclusive list.

1. Examines and analyzes difficult and complex business and commercial accounting, financial and operational records and documents in order to verify that the records accurately reflect the cost of taxable assets, gross receipts and payroll expenses and related accounts reported on tax renditions.
2. Makes on-site visits to businesses to update business information and appraise personal property such as fixtures, office and restaurant equipment and leasehold improvements in order to determine the correct market value of taxable property.
3. Makes on-site visits to businesses to inspect and observe general business operations, activities and records in order to update information and verify that taxpayer's gross receipts and payroll expenses are in conformity with what has been recorded.
4. Communicates with taxpayers and their representatives in person, on the telephone and in writing, to resolve problems, review audit findings and to explain pertinent laws, regulations, codes and procedures to ensure correct reporting of payroll expense and gross receipts and correct tax assessments.
5. Summarizes and documents audit and appraisal determinations by writing narratives and reports outlining the scope of examinations and inspections, procedures used and findings; makes recommendations and/or adjustments based on findings of audit/appraisal.
6. Instructs new and subordinate auditors in departmental policies and procedures, auditing methods, and use and application of tax codes and ordinances; may supervise the activities of auditors and clerical staff in the absence of the principal auditor.
7. May drive a motor vehicle to businesses and inspection sites; work may entail travel outside the City and County.
8. Performs related duties as required.

JOB RELATED AND ESSENTIAL QUALIFICATIONS:

Knowledge of: general accounting and auditing principles and practices; methods used to audit and verify commercial accounting and bookkeeping entries, financial records and reports; methods used in the appraisal of commercial and industrial properties and fixtures for personal property tax purposes; laws, codes and ordinances applicable to auditing and assessment processes

Ability to: identify, extract, analyze and interpret information required to correctly determine tax obligation; effectively prioritize, coordinate and schedule multiple appointments and assignments; prepare clear, concise and accurate narrative audit reports, memos and correspondence; interact effectively and courteously with the public; establish and maintain effective working relationships; speak clearly, concisely and effectively in order to communicate work-related information; instructs new auditors; use a personal computer to research, extract and process information and prepare correspondence and reports

EXPERIENCE AND TRAINING GUIDELINES:

Possession of a baccalaureate degree from an accredited four-year college or university with major coursework in accounting, including at least 18 semester units or 24 quarter units of accounting and/or auditing courses, or possession of a valid Certified Public Accountant License;

AND

Two years of verifiable professional-level auditing experience in the appraisal and assessment of personal property tax or payroll and business tax, with duties equivalent to those of Class 4220 Personal Property Auditor (experience must include reviewing and verifying the accuracy of accounting reports)

License: Possession of a valid California Driver's License.

EFFECTIVE DATE: January 1961

AMENDED DATE: 5/19/00

REASON FOR AMENDMENT: to accurately reflect the current tasks, knowledges, skills and abilities defined in the most recent job analysis conducted for this job code

SAN FRANCISCO CIVIL SERVICE COMMISSION

CLASS TITLE: PRINCIPAL PERSONAL PROPERTY AUDITOR

CODE: 4224

CHARACTERISTICS OF THE CLASS:

Under general direction, is responsible for organizing and supervising the appraisal of personal property and fixtures of commercial and industrial firms for tax assessment purposes; personally audits the more complex accounts and carries out specialized auditing and assessment assignments; or performs specialized auditing work in connection with import and export, bankruptcy, board of trade and probate matters involving personal property taxes; and performs related duties as required.

Requires responsibility for: carrying out, interpreting and coordinating existing personal property tax assessment methods and procedures; making regular important contacts with the general public or representatives of businesses of industrial firms in connection with personal property assessment matters; preparing, checking, reviewing and approving important records and reports relative to personal property assessments.

EXAMPLES OF DUTIES:

1. Assigns, supervises, reviews and approves the activities and field audits of subordinate property auditors; occasionally accompanies subordinate auditors in the field and assists in completing more complex audits; examines auditor's findings and makes determinations as to final assessments.

2. Audits and supervises auditing activities relating to commercial warehouses, household and warehouse probate matters, board of trade, private trustee and court trust assessments.

3. Interviews taxpayers and representatives of business and industrial firms relative to complaints on assessed evaluations.

4. Recommends or approves changes in assessed evaluations; plans, supervises and participates in the annual out-of-state audit tours.

5. Interprets state revenue and taxation codes to subordinate employees, the general public and representatives of business and industrial firms.

6. Plans and executes surveys covering the assessment of specialized classes of personal property; inspects and reviews household property; returns and audits appraisals when necessary.

7. May appear in court as an expert witness on personal property matters.

8. Trains and supervises the training of new auditors and seasonal clerical staff.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of a four year college or university, with a baccalaureate degree, with major course work in accounting.

Requires four years of progressively responsible experience in accounting, auditing and appraisal of personal property and fixtures of large commercial and industrial firms; or an equivalent combination of training and experience.

CLASS TITLE: PRINCIPAL PERSONAL PROPERTY AUDITOR

CODE: 4224

Knowledge, Abilities and Skills: Requires comprehensive knowledge of: general accounting and auditing principles and procedures; the methods and techniques used in the appraisal of commercial property and fixtures; revenue and tax codes pertaining to the assessment of personal property.

Requires considerable ability to: plan, assign and supervise the work of subordinate auditing personnel; make business personal property appraisals of the most difficult and complex type; analyze existing appraisal and assessment systems and make recommendations for their revision; analyze financial and accounting records and draw logical conclusions therefrom; prepare complex work papers and reports on assessment matters.

License: Requires a valid state motor vehicle operators license.

PROMOTIVE LINES:

To: Chief Personal Property Auditor

From: Senior Personal Property Auditor

(NEW CLASS)

CLASS TITLE: ASSISTANT CHIEF PERSONAL PROPERTY AUDITOR

CODE: 4225

CHARACTERISTICS OF THE CLASS:

Under general direction, serves as principal assistant to the Chief Personal Property Auditor in directing the auditing of all personal property and fixtures for tax assessment purposes; may personally perform the most difficult and important personal property audit-appraisal work; supervises all Business Audit Sections of the Assessor's office; reviews and updates procedures and methods; and performs related duties as required.

Requires responsibility for: Assisting in the development, coordination and enforcement of tax assessment procedures and methods relative to the evaluations of commercial and industrial properties; making regular contacts with business firms, governmental agencies and their representatives in connection with personal property valuation methods and procedures; requires supervisory responsibility over personnel preparing, checking, and reviewing important audits, assessment reports, and records.

EXAMPLES OF DUTIES:

1. Supervises the business audit sections of the Personal Property Division of the Assessor's office; coordinates the work and procedures of the various sections in this division, including auditing, probate, warehouse, petroleum, leased equipment, marine and technical services; may perform the most difficult and complex audit-appraisal functions.

2. Reviews tax codes, administrative code, court decisions, and State Board of Equalization Regulations with a view toward maintaining assessment standards and uniform application of policies, procedures and methods.

3. Compiles and maintains procedure manuals needed to implement office policies, direct billing, field book work, processing of business statements, classification of fixtures, leasehold improvements, penalty assessments and provisions for refunds and/or cancellations.

4. Maintains liaison with the State Board of Equalization, Assessment Standards Division, on proposed legislation and rules and regulations pertaining to local assessment offices; participates in Intercounty Assessment Standards Committee meetings for purposes of exchanging information and achieving uniformity in assessment practices.

5. Assists the Chief, Personal Property Division, in his duties and acts for the Chief in his absence; assists personnel to achieve State Appraiser Certificate; conducts in-service training courses and lectures on procedures.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of a four-year college or university, with a baccalaureate degree with major course work in accounting.

Requires five years of progressively responsible experience in accounting, auditing and appraisal of personal property and fixtures of commercial and industrial firms, including two years of responsible supervisory experience; or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Requires comprehensive knowledge of: The methods and procedures used in auditing and appraisal for tax assessment purposes of property and fixtures in commercial and industrial firms; accounting and auditing principles and procedures; revenue and tax codes pertaining to auditing and assessment of property.

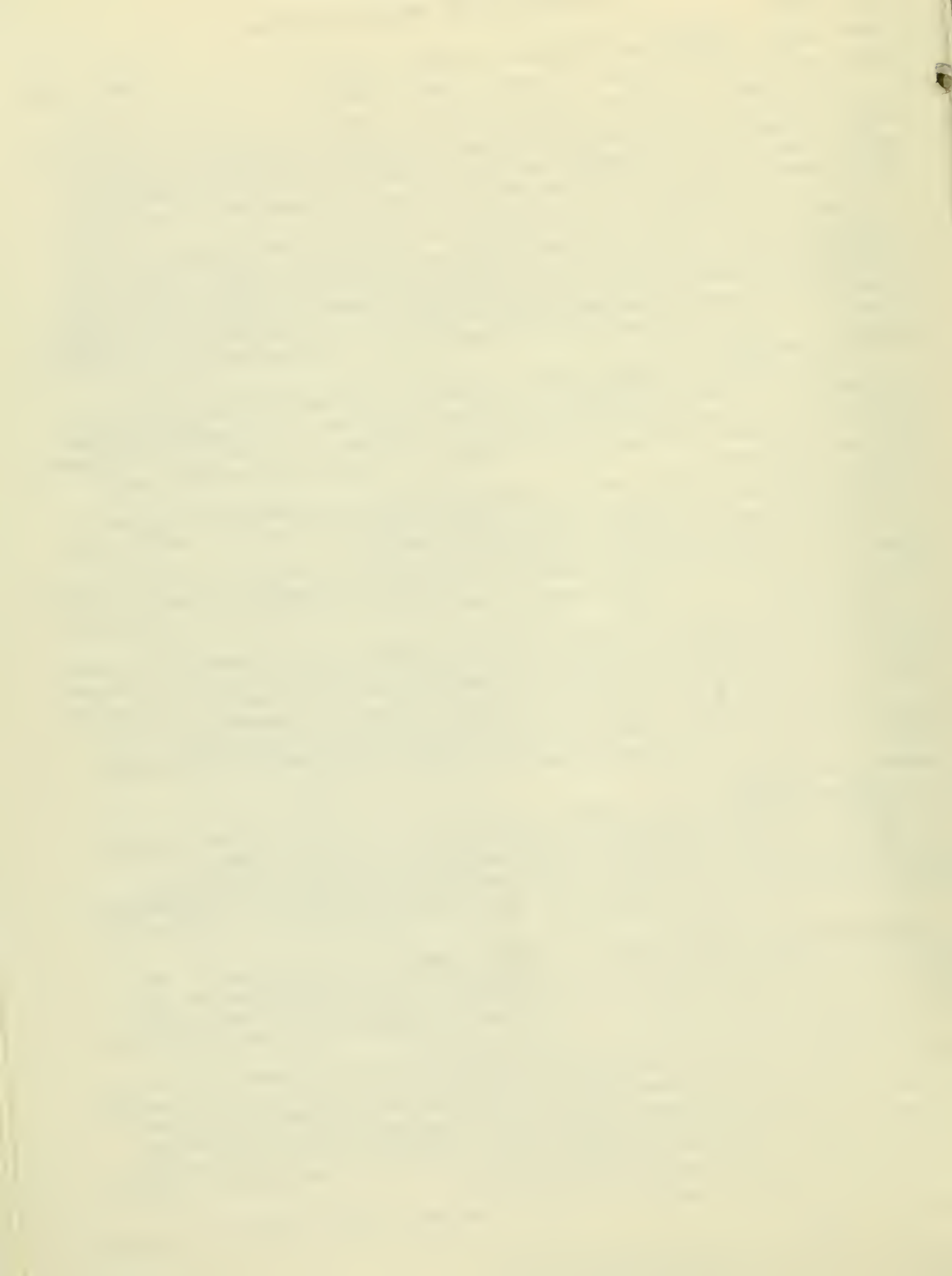
Requires considerable ability to: Plan, supervise, and coordinate the work of personnel engaged in property auditing activities; update and maintain a wide variety of office procedures and methods; assist the Chief Personal Property Auditor formulate policies relating to commercial and industrial properties for tax assessment purposes; analyze and resolve the most difficult problems in the property auditing and tax assessment field; speak and write effectively; deal effectively with members of business organizations and government agencies.

License: Requires possession of a valid State Motor Vehicle Operator's License.

PROMOTIVE LINES:

To : 4226 Chief Personal Property Auditor

From: 4224 Principal Personal Property Auditor



SAN FRANCISCO CIVIL SERVICE COMMISSION

CLASS TITLE: CHIEF PERSONAL PROPERTY AUDITOR

CODE: 4226

CHARACTERISTICS OF THE CLASS:

Under general administrative direction, is responsible for planning, coordinating and directing the work of subordinate personnel engaged in the auditing and evaluation of all types of personal property in the city and county; and performs related duties as required.

Requires major responsibility for: developing, coordinating and enforcing tax assessment procedures and methods relative to the evaluation of personal property; making regular important contacts with the general public, property owners and representatives of business and industrial firms in connection with personal property and assessment matters; requires over-all supervisory responsibility for the preparation of important personal property tax records and reports.

EXAMPLES OF DUTIES:

1. Assists in the formulation of appraisal policies relating to personal property appraisal work.
2. Answers inquiries and adjusts complaints referred by field auditors or by supervisory or subordinate personnel.
3. Meets and confers with tax payers and legal and fiscal representatives of business and industrial firms relative to assessment procedures and property evaluation methods and practices.
4. Reviews personal property taxation and assessment methods and makes recommendations for refinement or changes.
5. Represents the assessor on assessment problems and procedures at state and local board of equalization meetings and other professional functions.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of a four year college or university, with a baccalaureate degree, with major course work in accounting.

Requires six years of progressively responsible experience in appraisal work for tax assessment purposes on personal property and fixtures of large commercial and industrial firms, including three years of responsible supervisory experience; or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Requires comprehensive knowledge of the methods and procedures used in appraisal, for tax assessment purposes, of personal property and fixtures of commercial and industrial firms; general accounting and auditing principles and procedures; revenue and taxation codes pertaining to assessment of personal property for tax assessment purposes.

Requires considerable ability to plan, coordinate and direct the work of subordinate personnel; develop appraisal standards and evaluation schedules; audit complex commercial and industrial accounting systems and effectively relate such audits to the tax assessment program; analyze and resolve difficult or complex evaluation and assessment problems; speak and write effectively and prepare accurate and concise work papers and reports.

Requires considerable skill in the application of assessment, auditing and accounting procedures and techniques to practical tax assessment problems.

License: Requires possession of a valid state motor vehicle operators license.

PROMOTIVE LINES: To: Assistant Assessor

From: Principal Personal Property Auditor

CHARACTERISTICS OF THE CLASS:

Under general supervision, performs responsible investigative work in connection with the locating, inventory and preservation of assets of estates coming under the jurisdiction of the public administrator; and performs related duties as required.

Requires responsibility for carrying out, explaining and enforcing policies and procedures of the public administrator's office relative to estate matters; personal contacts with friends and relatives of the deceased, business and professional people, government officials and the general public; preparing important legal and financial records concerning the collection and disposition of property; handling property and large sums of money.

EXAMPLES OF DUTIES:

1. Collects keys to premises and safe deposit boxes, personal papers and valuables of deceased persons; collects pertinent background information on such persons from the coroner and various hospitals and institutions; packs and takes into custody personal effects such as clothing or other personal properties; maintains storage rooms and records showing property on hand and final disposition of same; assists in the sale of articles to be liquidated from estates.

2. Assists in all investigations of premises and effects of deceased persons; locates wills, burial instructions, evidence of safe deposit boxes and other valuables and evidence of assets and takes into custody automobiles, trucks and motorcycles and delivers same to public administrator's garage.

3. Investigates complaints regarding real property being held by the public administrator and claims by parties alleging to have left properties in custody with deceased; obtains affidavits from claimants and delivers property to claimants as directed.

4. Makes safe deposit box searches and assists in compiling inventories of contents.

5. Processes and enters all claims against estates.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of a four year college or university with a baccalaureate degree, with major course work in public administration, business administration, law, economics or accounting.

Requires one year of business experience involving investigative responsibilities and the processing of legal and financial documents; or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Requires knowledge of legal documents, titles to property, both real and personal; office and court procedures; processes involved in the administration of estates, including real estate practices, banking and other financial procedures.

CLASS TITLE: ESTATE INVESTIGATOR (continued)

CODE: 4230

Requires ability to: deal courteously and effectively with others in handling difficult personal situations; perform investigations; administer the estates of deceased persons; prepare reports.

PROMOTIVE LINES:

To: Assistant Public Administrator

From: Original Entrance Examination

SAN FRANCISCO CIVIL SERVICE COMMISSION

CLASS TITLE: SENIOR ESTATE INVESTIGATOR

CODE: 4231

CHARACTERISTICS OF THE CLASS:

Under direction, performs the more responsible and difficult investigative work in connection with the location, inventory and preservation of assets of estates coming under the jurisdiction of the Public Administrator; supervises, trains and reviews the work of subordinate investigators; and performs related duties as required.

DISTINGUISHING FEATURES:

Incumbents in this class are assigned the most complex and difficult estate investigations where there may have been a violation of the law. Additionally, incumbents in this class assign, supervise and evaluate the work of Estate Investigators engaged in the conduct of the more routine investigations. This classification is distinguished from the lower investigative level by its supervisory responsibility and responsibility for conducting the more involved estate investigations.

EXAMPLES OF DUTIES:

1. Performs difficult, complex and/or specialized estate investigations where there may have been a violation of the law; investigates cases involving a possible violation of the law where criminal prosecution may follow; conducts complex investigations which involve civil action where improprieties may have occurred and where there may be a possibility of recovering lost assets; performs investigations which involve complex financial transactions.
2. Supervises and participates in the more routine investigations and collection activities which include gathering pertinent personal background information; collecting personal property and evidence of other assets from residences, bank accounts and safe deposit boxes; arranging for or transporting the property to storage facilities; maintaining records. Reviews receipting procedures of subordinate estate investigators and works with bank officers to trace accounts for possible fraud.
3. Assigns, supervises, trains and evaluates the work of subordinate estate investigators; acts as a resource person; advises subordinates on the more difficult aspects of the work and enforces adherence to established policies and procedures.
4. Acts as an assistant to the departmental attorney for contested matters concerning conservatorships; compiles information for presentation in court and assists the attorney during court proceeding in gathering materials for appropriate documentation.
5. Serves subpoenas and/or summonses where there may be a possible violation of the law regarding a conservatee; evaluates pertinent information and data to determine if additional legal or criminal action should be considered and, if appropriate, makes recommendations for further legal action.
6. Acts as a liaison with the District Attorney's Consumer fraud unit and with the Police fraud section by exchanging information and evidence.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of a four year college or university with a baccalaureate degree in business administration, public administration, law, economics, accounting or a closely related field and three years of progressively responsible investigative experience including the processing of legal and financial documents; or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Requires a comprehensive knowledge of investigative techniques, methods and procedures; legal documents, titles to property, both real and personal; office and court procedures; processes involved in the administration of estates, including real estate practices; banking and other financial procedures; methods of supervision and training.

Requires ability to: plan, assign, train and supervise the work of subordinate personnel; deal courteously and effectively with others in handling difficult situations; analyze and evaluate data collected in the course of investigations; handle complex investigations with tact and resourcefulness; maintain records and prepare reports.

ADOPTED: 1-14-85
#0044b

CLASS TITLE: ESTATE TAX SECRETARY

CODE: 4234

CHARACTERISTICS OF THE CLASS:

Under general supervision, reviews and analyzes inventories of estates under control of the Public Administrator in connection with the payment of taxes due to federal, state and city jurisdictions; takes and transcribes important legal dictation relative to court calendar and estates; and performs related duties as required.

Requires responsibility for: carrying out existing policy and procedures relating to payment of state taxes; making frequent personal contacts with tax officials of various governmental units, relatives and friends of deceased persons, lawyers and business representatives; preparing important legal tax records.

EXAMPLES OF DUTIES:

1. Prepares inheritance tax affidavits showing proof of heirship and other pertinent data from written instruction from attorneys; does research investigation on special tax cases.

2. Analyzes estate inventories to determine which taxes are due for the current year as well as for four years prior to death; secures information as to source and amount of income; prepares delinquent and fiduciary returns; secures audit from federal and state tax authorities on all returns filed.

3. Analyzes and prepares federal estate tax returns.

4. Analyzes personal property tax statements submitted by assessor with taxable assets in each estate and makes decision to pass or reject such statements.

5. Enters into court calendar cases with tax entries and secures or prepares necessary legal documents for court hearings.

6. Prepares court calendars and maintains court actions.

7. Supervises the maintenance and upkeep of tax files.

8. Takes and transcribes important legal dictation relative to court calendar and estates.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of high school, supplemented by five years of clerical and office experience related to the processing of inheritance, income and other federal, state and municipal taxes; or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Requires considerable knowledge of: legal forms, documents, terminology and estate tax proceedings; real and personal property and federal and state taxation laws and regulations; general office procedures.

Requires ability to analyze, compute and process estates according to applicable laws, ordinances and regulations; maintain accurate files and records on cases handled.

Requires sufficient skill in typing and shorthand to complete 50 net words per minute and 110 net words per minute respectively.

PROMOTIVE LINES:

To: No normal line of promotion

From: Senior Legal Stenographer
Original entrance examination



CLASS TITLE: INHERITANCE TAX EXAMINER

CODE: 4240

CHARACTERISTICS OF THE CLASS:

Under supervision, performs ordinary field and office work in connection with processing papers and documents and the inventory of safety deposit boxes in connection with the collection of inheritance taxes; and performs related duties as required.

Requires responsibility for: carrying out existing policies and methods relative to application of inheritance tax laws; making regular contacts of an extremely delicate nature with the families of recently deceased persons relative to inheritance tax matters; preparing and maintaining records and reports on inheritance tax matters.

EXAMPLES OF DUTIES:

1. Makes appointments and conducts routine interviews with families of recently deceased persons relative to the inventory and itemizing of assets in safety deposit boxes.

2. Prepares consents to transfer assets and funds of deceased persons upon completion of inventories and the payment of inheritance taxes; prepares receipts for payments made.

3. Maintains all office records and files in connection with inheritance tax operations.

4. Assists in inventorying the contents of safety deposit boxes; may be assigned individually to inventories of a less complex nature.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of high school, supplemented by two years of progressively responsible clerical and business experience, including considerable public contact work; or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Requires knowledge of: the various documents representing assets and liabilities such as stocks, bonds, deeds, and negotiable instruments; fiscal records and procedures of banks and business institutions; modern office practices and procedures; complex record keeping systems.

Requires ability to: interpret complex provisions of legal codes and procedures, including the probate code; effectively handle persons under emotional strain and to inspire confidence and cooperation.

PROMOTIVE LINES:

To: Senior Inheritance Tax Examiner

From: Original Examination

CLASS TITLE: SENIOR INHERITANCE TAX EXAMINER

CODE: 4242

CHARACTERISTICS OF THE CLASS:

Under general supervision, performs responsible field and office work in examining the extent and kind of personal assets left by deceased persons relative to the assessment of inheritance taxes; and performs related duties as required.

Requires responsibility for: interpreting, explaining and carrying out applicable provisions of existing inheritance tax laws; making regular contacts of an extremely delicate nature with the families of recently deceased persons; checking and reviewing detailed and complex records and instruments found in safety deposit boxes.

EXAMPLES OF DUTIES:

1. Attends openings of safety deposit boxes of deceased persons and examines the extent and kind of personal assets therein; itemized and describes the contents of such boxes for computation of inheritance tax liability.

2. Prepares and issues consents to transfer assets; consults and corresponds with attorneys and heirs to facilitate and expedite release of deceased persons assets.

3. Confers with attorneys and heirs and provides information on the application of the probate code; accepts payment for inheritance tax liabilities and issues receipts for same.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of high school, supplemented by at least four years of progressively responsible clerical and business experience, including experience in public contact work; or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Requires good knowledge of: various documents representing assets and liabilities such as stocks, bonds, real property deeds, negotiable instruments, bank accounts and trust funds; knowledge of internal fiscal records and procedures of banks and business institutions; modern office practices and procedures and office equipment.

Requires ability to: interpret complex provisions of legal codes and procedures, including the probate code; deal effectively with persons under emotional strain and to inspire confidence and cooperation; exercise a high degree of poise and tactfulness; interpret and apply existing laws, rules and regulations to specific situations; analyze data and information and to draw logical conclusions therefrom; make clear and comprehensive reports on examinations made.

PROMOTIVE LINES:

To: Principal Inheritance Tax Examiner

From: Inheritance Tax Examiner



CLASS TITLE: PRINCIPAL INHERITANCE TAX EXAMINER

CODE: 4244

CHARACTERISTICS OF THE CLASS:

Under direction, is responsible for all functions and operations of the inheritance tax division of the treasurer's office; plans, assigns and supervises the activities of subordinate personnel engaged in such functions; and performs related duties as required.

Requires responsibility for interpreting and coordinating existing laws related to the collection of inheritance taxes; making regular contacts of extremely delicate nature with families of recently deceased persons; requires over-all supervisory responsibility for the preparation of detailed inventories, records and reports relating to inheritance tax activities.

EXAMPLES OF DUTIES:

1. Receives and reviews inventories of safety deposit boxes relative to the assessment of inheritance taxes.
2. Meets and confers with legal and bank representatives and families of deceased persons in connection with the administration of inheritance tax laws and the collection of inheritance taxes.
3. Supervises and approves the preparation of consents to release assets upon review and approval of safety deposit box inventories.
4. Maintains liaison with state officers relative to the collection of commissions paid to the city as agent in inheritance tax matters.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of high school, supplemented by at least six years of progressively responsible clerical and business experience with responsible experience in public contact work, including two years of responsible supervisory experience; or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Requires considerable knowledge of various documents representing assets and liabilities; the internal fiscal records and procedures of banks and business institutes; the various laws, codes and regulations applicable to inheritance taxes; modern office methods and practices.

Requires considerable ability to interpret provisions of legal codes and procedures including the probate code; meet and deal effectively with persons under emotional strain; inspire confidence and cooperation and to exercise a high degree of poise and tactfulness in dealing with such persons; plan, assign and supervise the work of subordinates.

PROMOTIVE LINES:

To: Assistant Treasurer

From: Senior Inheritance Tax Examiner



CHARACTERISTICS OF THE CLASS:

Under general supervision, makes physical inspection of all types of water craft and estimates their value for tax assessment purposes; and performs related duties as required.

Requires responsibility for: explaining and carrying out existing tax assessment procedures related to the personal property taxes of various water craft; making regular contacts with the general public on tax assessment matters pertaining to taxable water craft; preparing and maintaining detailed records on all taxable water craft in the city and county.

EXAMPLES OF DUTIES:

1. Makes field inspections in connection with identifying types, locations and ownership of taxable water craft.
2. Interviews owners of taxable water craft and assists them in complying with laws pertinent to the registration, assessment and taxation of such crafts.
3. Explains methods used to determine assessed evaluations of water craft; certifies annual tax declarations filed by boat owners, and renders assistance in the preparation of such declarations.
4. Requests and evaluates various data in establishing costs of duplication, replacement and market value of water craft, including repair, conversion, alteration, reconstruction and repowering in connection with establishing proper evaluations for tax purposes.
5. Prepares a variety of reports and work papers relative to the taxation of water craft.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of high school, supplemented by at least four years of progressively responsible experience in the inspection, survey, repair and construction of all types of water craft; or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Requires knowledge of: the methods and procedures used in appraising water craft and auxiliary marine equipment; the construction, materials and equipment common to a variety of water craft; revenue and tax codes applicable to water craft.

Requires ability to: recognize and interpret the factors effecting the values of water craft; analyze various data applicable to the tax assessment of water craft and draw logical conclusions therefrom; prepare and maintain accurate records and reports.

License: Requires possession of a valid state motor vehicle operators license.

CLASS TITLE: MARINE APPRAISER (continued)

CODE: 4250

PROMOTIVE LINES:

To: Senior Marine Appraiser

From: Original Examination

CLASS TITLE: SENIOR MARINE APPRAISER

CODE: 4252

CHARACTERISTICS OF THE CLASS:

Under general direction, is responsible for the evaluation, for tax purposes, of all water craft registered in the city and county; supervises the activities of subordinate personnel engaged in such appraisal and evaluation work; and performs related duties as required.

Requires responsibility for: interpreting and enforcing tax laws as they apply to water craft; making regular important contacts with boat owners and outside agencies in connection with tax assessment matters; preparing, checking and reviewing detailed records relative to the tax assessment of water craft.

EXAMPLES OF DUTIES:

1. Examines and checks values recommended by subordinates to assure tax equalization for the various types of water craft involved.
2. Assists and advises other assessment districts on matters related to the taxation of water craft.
3. Supervises the preparation and maintenance of work papers, reports and records reflecting the ownership status and physical features of water craft.
4. Personally makes specialized or difficult evaluation surveys of taxable water craft.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of high school, supplemented by at least seven years of progressively responsible experience in the surveying, inspection, construction and repair of all types of water craft, including three years of responsible supervisory experience; or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Requires comprehensive knowledge of: the methods and practices utilized in appraising all types of water craft; economic and other factors affecting the value of water craft.

Requires considerable ability to: plan, organize and supervise the marine appraisal program; make marine appraisals of a more difficult and complex nature; establish and maintain cooperative and effective relationships with marine property owners and outside agencies and organizations; analyze and evaluate data and information and draw logical conclusions therefrom.

License: Requires possession of a valid state motor vehicle operators license.

PROMOTIVE LINES:

To: No normal lines of promotion

From: Marine Appraiser



CLASS TITLE: REAL ESTATE ANALYST

CODE: 4256

CHARACTERISTICS OF THE CLASS:

Under general direction, is responsible for conducting statistical and economic surveys relative to conditions and trends in the real estate market in determining equitable assessed values and anticipating changes effecting real property values; and performs related duties as required.

Requires major responsibility for: assisting in the development of new techniques, procedures and legislation effecting real property tax matters; making regular contacts with persons at all levels in respect to real property tax matters; requires independent responsibility for preparing and reviewing important and detailed records and reports on real estate transactions.

EXAMPLES OF DUTIES:

1. Analyzes large real property sales and consults with land and building appraisers in determining the influence of such sales on property values.

2. Forecasts the trends in real estate values on the basis of research and analysis; makes a wide variety of real estate studies including rental and vacancy studies, studies of changes in neighborhood patterns and redevelopment and construction impact on property evaluation.

3. Represents the assessor before various bureaus and agencies on matters pertaining to property evaluation; attends conferences and reports on the effect of city planning proposals on assessed evaluations.

4. Maintains liaison with other county and state agencies on intercounty problems, statistical surveys, appraisal techniques and uniform assessment standards.

5. Attends legislative committee hearings and presents testimony on legislation covering tax and assessment practices which effect the city and county.

6. Corresponds and personally conducts interviews with the general public involving technical aspects of property evaluations; may appear before various civic organizations and real estate groups to discuss or speak on real property evaluation for assessment purposes.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of a four year college or university with a baccalaureate degree, with major course work in public administration, accounting, economics or statistics, supplemented by special course work in real estate appraisal, particularly as applied to the appraisal of land and buildings.

Requires six years of progressively responsible experience in negotiating transfer and sale of real property, analyzing property income statements and appraisal of buildings and land; or an equivalent combination of training and experience.

CLASS TITLE: REAL ESTATE ANALYST (continued)

CODE: 4256

Knowledge, Abilities and Skills: Requires comprehensive knowledge of: the methods and procedures utilized in gathering and analyzing data and conducting statistical and economic surveys relative to the evaluation of real property; the revenue and taxation code and existing laws, ordinances and regulations governing real property tax assessment; factors involved in the appraisal of real property and the principles underlying the appraisal of real property.

Requires considerable ability to: establish and maintain working relationships with the general public, other governmental agencies and various civic organizations and groups; review and analyze complex records, reports and data and to make sound recommendations on real property assessments therefrom.

PROMOTIVE LINES:

To: No normal lines of promotion

From: Original examination

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**CITY AND COUNTY OF SAN FRANCISCO
DEPARTMENT OF HUMAN RESOURCES**

4260 REAL PROPERTY APPRAISER TRAINEE

Definition:

Under immediate supervision, the Real Property Appraiser Trainee works as the entry or training level position in the professional appraisal series in the Assessor's Office. Incumbents in this class receive substantial formal classroom and on-the-job training; they initially function as an assistant to higher level appraisal staff and with increasing training and experience will be required to perform simple and routine appraisals.

Distinguishing Features:

The 4260 Real Property Appraiser Trainee is the entry-level class in the professional appraisal series. Incumbents receive substantial classroom and on-the-job training under the immediate supervision of professional appraisal staff. This class is distinguished from Class 4261 Real Property Appraiser in that the latter is a journey level class responsible, under general supervision, for examining, analyzing and evaluating real property for tax assessment purposes.

Supervision Exercised: None.

Examples of Important and Essential Duties:

According to Civil Service Commission Rule 9, the duties specified below are representative of the range of duties assigned to this class and are not intended to be an inclusive list.

1. Completes formal classroom training, on-the-job training exercises, and closely monitored work assignments.
2. Under immediate supervision, analyzes information from a variety of sources, including property statements and interviews with tax payers, in order to update information on land and/or improvements to be used for taxation purposes.
3. Under immediate supervision, analyzes sales and economic factors within assigned districts by reviewing leases, rental agreements, trust deeds and market data for assessment purposes.
4. Under immediate supervision, estimates property value by comparing land sales, improvement costs, market information and by making site visits in order to estimate the taxable value of properties within a district to comply with the Revenue and Taxation Code.
5. Under immediate supervision, investigates complaints on assessments from property owners by conducting on site visits, and reviewing and researching records and reports; makes recommendations regarding resolution of such complaints.
6. Recommends changes in valuation to supervisor, both orally and in writing.
7. Prepares various records and reports related to appraisal of all classes of real property.
8. Responds to inquiries from the general public regarding property assessment matters.
9. Performs other duties as required.

4260 REAL PROPERTY APPRAISER TRAINEE

JOB RELATED AND ESSENTIAL QUALIFICATIONS:

Skill and Ability to: to interact tactfully and courteously with the general public, co-workers, supervisors and other departmental personnel; effectively present, explain and discuss appraisal information and property tax rules with the general public; extract and interpret information from a variety of source such as blueprints, sketches, legal property descriptions, charts, tables and socio-economic trends in order to determine proper tax assessment valuations; perform simple mathematical calculations such as addition, subtraction, multiplication, division and computing percentages and measurements; accurately prepare electronic notes and written reports with clear and concise information including narrative writing.

Experience and Training Guidelines:

1. Possession of a valid Driver License; **AND**
2. Possession of a baccalaureate degree from an accredited university or college. Applicants who do not possess a baccalaureate degree may substitute relevant, verifiable experience for the college degree on a year for year basis, with one year (2000 hours) of qualifying experience equivalent to 30 semester units or 45 quarter units. Relevant work experience includes other real estate related activities such as building cost estimating, structural engineering, accounting, auditing, or working as a real estate Agent licensed by the State of California with buying, selling, leasing or managing functions.

Effective Date: 6/23/66

Amended Date: 10/22/99

Reason for Amendment:

To accurately reflect the current tasks, knowledge, skills and abilities defined in the most recent job analysis conducted for this job code.

CITY AND COUNTY OF SAN FRANCISCO
DEPARTMENT OF HUMAN RESOURCES

4261 REAL PROPERTY APPRAISER

Definition: Under general supervision, a Real Property Appraiser performs responsible professional appraisal work in connection with examining, analyzing and evaluating real property for tax assessment purposes.

Distinguishing Features: The 4261 Real Property Appraiser is the journey level class in the professional appraisal series responsible, under general supervision, for examining, analyzing and evaluating real property for tax assessment purposes. This class is distinguished from Class 4260 Real Property Appraiser Trainee in that the latter is an entry-level trainee position responsible for performing simple and routine appraisals under immediate supervision.

Supervision Exercised: None.

Examples of Important and Essential Duties: According to Civil Service Commission Rule 9, the duties specified below are representative of the range of duties assigned to this class and are not intended to be an inclusive list.

1. Appraises all classes of real property, including residential properties such as dwellings, condominiums, cooperatives and apartment complexes, as well as commercial and industrial properties such as office buildings, hotels, motels, shopping centers, industrial warehouses and manufacturing facilities, to establish values for tax assessment purposes.
 - a) Gathers and analyzes data related to land and improvements from varied sources, including reviewing property statements, interviewing property owners and reviewing charts and tables in order to estimate taxable value.
 - b) Gathers and analyzes sales data, market transactions, income/expense, cost and other market data; reviews leases, rentals and trust deeds in order to estimate taxable value of income-producing real property.
 - c) Makes site visits of properties to be appraised in order to gather information, such as building class, use, construction quality and type, in order to estimate taxable value of individual properties; drives automobile to accomplish these visits as required.
 - d) Estimates value of real property by use of standardized approaches to value (market, cost and income), including evaluation of land sales, improvement costs, market information and information gained during site visits, in order to estimate the taxable value of properties within a district.
 - e) Develops capitalization rates, capitalizes income and develops gross rent multipliers into indicators of value in order to estimate taxable value of income producing real property.
 - f) Evaluates property upon change in ownership and recommends changes in valuation to supervisor, both verbally and in writing, to maintain an equitable basis for assessment of property.
 - g) Separates land and improvement values for assessment roll as required by revenue and taxation code; reconciles land and improvement valuations in establishing equity in assessments.
2. Compiles and records data related to appraisal of real property, including narrative reports, charts, tables, detailed property descriptions, measurements and classification of improvements. The majority of these tasks are completed utilizing computer software programs.
3. Performs special investigations and appraisal surveys, such as rent surveys in commercial areas.
4. Investigates complaints on property assessments by interviewing taxpayers, conducting on-site visits, and researching records and reports in order to make recommendations to supervisor for changes in valuation.
5. Explains appraisal and assessment procedures to homeowners, taxpayers and general public.
6. Appears as expert witness before quasi-judicial bodies, such as the Assessment Appeals Board, in order to answer questions on assessment issues.
7. Maintains professional certification and competency by completing 24 hours of State approved appraisal courses annually.
8. Performs other duties as required.

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4261 REAL PROPERTY APPRAISER

Job Related and Essential Qualifications:

Knowledge of: government codes, regulations and laws, including the Revenue and Taxation Code, relevant portions of the State Constitution, zoning laws and other laws and regulations as they apply to appraisal of real property for tax assessment purposes; methods, procedures, and terminology used in establishing current value of all types of real property; the effect of economic trends on the value of existing real property and the cost of new construction and renovation.

Skill and Ability to: identify and assemble relevant data and extract, evaluate and interpret information required to determine proper tax assessment valuations; identify and recommend reasonable conclusions and/or courses of action; prioritize multiple assignments in order to meet deadlines; apply basic arithmetic skills to calculate property value; prepare clear, concise and accurate technical reports, records, narratives, memos, and recommendations; interact effectively and courteously with the public; establish and maintain effective and cooperative working relationships; clearly and effectively communicate work-related information to the public, departmental staff, representatives of other agencies, organizations and official bodies; listen and elicit information necessary for the correct appraisal of real property; use a computer to extract, record, and process information.

Experience, Training and Certification Guidelines:

- 1A. One (1) year (2000 hours) of verifiable experience in the past 10 years appraising real property for tax assessment purposes; **OR**
- 1B. Three (3) years (6000 hours) of verifiable experience in the past 10 years appraising real property as a fee, institutional or government appraiser. **AND**
2. Possession of a baccalaureate degree from an accredited four-year college or university. Applicants who do not possess a baccalaureate degree may substitute relevant, verifiable experience for the college degree on a year for year basis, with one year (2000 hours) of qualifying experience equivalent to 30 semester units or 45 quarter units. Relevant work experience may include additional experience as described in 1A or 1B above, as well as other real estate related activities such as building cost estimating, structural engineering, accounting, auditing, or working as a real estate broker licensed by the State of California with buying, selling, leasing or managing functions; **AND**
3. Possession of a valid Driver License; **AND**
4. Permanent certification from the California State Board of Equalization as an appraiser for property tax purposes.

Effective Date: 6/23/66

Amended Date: 10/22/99

Reason for Amendment:

To accurately reflect the current tasks, knowledge, skills and abilities defined in the most recent job analysis conducted for this job code.

ABOLISHES: 4214 Personal Property Records Supervisor

CLASS TITLE: ASSISTANT CHIEF, TECHNICAL SERVICES, ASSESSOR'S OFFICE CODE: 4263

CHARACTERISTICS OF THE CLASS:

Under direction, assists in directing the preparation of the secured and unsecured assessment rolls; maintains accurate controls on documents relating to assessment rolls; assists Chief of Technical Services in coordinating the flow of assessment information between the Assessor's Office, Tax Collector's Office and the Data Processing Sections of the Controller's Office; supervises subordinates; and performs related duties as required.

Requires responsibility for explaining and enforcing policies of the Assessor's Office relating to assessment procedures; assisting in the conversion of assessment methods and procedures to electronic data processing; making regular contacts with other departmental personnel, the general public and outside organizations and representatives relative to the work of the Assessor's Office; performs difficult research and prepares necessary reports.

EXAMPLES OF DUTIES:

1. Assists in directing the processing of a wide variety of assessment records and documents reflecting changes in real property valuation; hand posts changes to control records; prepares reports showing changes in real property valuation for Board of Supervisors, Electronic Data Processing Unit, and other interested City departments.

2. Assists the Chief of Technical Services in coordinating the activities of various record keeping operations in processing assessment data in connection with printing the assessment rolls for each year; may supervise the preparation of block books, field maps and new subdivision maps; acts for the Chief in his absence.

3. Assists in coordinating the work of the Assessor's Office with those responsible for the design and implementation of computer-oriented office systems and procedures.

4. Directs the processing of real estate sales documents received daily from the Real Estate Division for batching and forwarding to electronic data processing; directs the processing of documents reflecting changes in property declarations, ownership and address.

5. Supervises the processing of Field Book sheets received from the Personal Property Audit Division for processing to the EDP unit preparatory to compilation of Business Personal Property Statements.

6. Reviews exemption claims for conformity with established regulations; responds to public requests for information in connection with assessment problems.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of a four-year college or university with a baccalaureate degree with major course work in public administration, accounting, business administration, economics or a closely related field, supplemented by special course work in real estate appraisal.

Requires at least two years of progressively responsible experience in one or a combination of the following: Administrative analysis, systems analysis, organization and methods studies, accounting, auditing, or appraisal of real and personal property, including at least one year of supervisory experience; or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Requires general knowledge of: The organization and administration of the Assessor's Office, revenue and taxation codes, laws, ordinances and regulations applicable to assessments; office methods and procedures as they relate to electronic data processing.

CLASS TITLE: ASSISTANT CHIEF, TECHNICAL SERVICES, ASSESSOR'S OFFICE CODE: 4263

MINIMUM QUALIFICATIONS: (contd)

Requires the ability to: Deal effectively and tactfully with departmental personnel, the general public and representatives of outside organizations; analyze and review detailed assessment documents, tax declarations, work papers and other records in connection with the field of tax assessment.

PROMOTIVE LINES:

To : 4266 Chief of Technical Services

From: 4220 Personal Property Auditor
4261 Real Property Appraiser

ADOPTED: 5/25/70

AMENDED

CLASS TITLE: SENIOR REAL PROPERTY APPRAISER

CODE: 4265

CHARACTERISTICS OF THE CLASS:

Under direction, performs responsible appraisal work in connection with examining, analyzing and evaluating high value industrial, commercial and residential real property for tax assessment purposes; may exercise work direction over and assists in training new appraisal personnel; and performs related duties as required.

Requires responsibility for: Interpreting, carrying out and enforcing existing real property tax assessment methods and procedures; making regular responsible contacts with the general public and property owners on property assessment matters; preparing detailed reports and work papers on appraisal activities.

EXAMPLES OF DUTIES:

1. Appraises all classes of real property, including high value residential properties such as apartment complexes, condominiums and cooperatives.
2. Appraises large commercial and industrial real properties including complex and/or specialized units such as large shopping centers and industrial plants.
3. Analyzes sales data and other economic factors within assigned districts, including leases, rentals, trust deeds and other relevant market data as required for assessment purposes.
4. Performs special investigations and reviews specialized residential, residential income, commercial and industrial properties; performs special appraisal surveys such as rental surveys in commercial areas.
5. Analyzes and reviews valuations of income producing personal and intangible property connected with high value residential properties and major commercial and industrial properties.
6. Determines church welfare and other exemptions based on departmental policy, legal precedent and revenue and taxation code.
7. Separates land and improvement valuations for the assessment roll as required by the Revenue and Taxation Code; recommends changes in assessed valuations to maintain an equitable basis for assessment of all properties within specific areas.
8. Explains basis of assessments to property owners; reviews complaints on assessments and makes recommendations for resolving such complaints.
9. Required to appear as an expert witness before quasi-judicial and judicial bodies relative to assessment matters.
10. Examines property for compliance with local building, health and planning codes and relates deficiencies to total value; may analyze and interpret leases and financial statements of properties subject to possessory interest taxes.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of a four year college or university, with a baccalaureate degree with major course work in business administration, real estate, architecture, engineering or a closely related field supplemented by special course work in real estate appraisal.

Requires two years of experience in the appraisal and evaluation of real property for tax assessment purposes; or an equivalent combination of training and experience.

Required to complete 24 hours of State approved appraisal training annually.

Knowledge, Abilities and Skills: Requires good knowledge of: The methods and practices used in the appraisal of real property for tax assessment purposes; revenue and taxation codes. ability

Requires considerable/to: Evaluate and interpret economic and environmental factors affecting the value of real property, particularly as applied to land and improvements; deal effectively and courteously with the general public; analyze data and keep accurate and detailed records of appraisals.

License: Requires possession of a valid State Motor Vehicle Operator's License.

PROMOTIVE LINES:

To : 4267 Principal Real Property Appraiser

From: 4261 Real Property Appraiser

ADOPTED: 3/9/67

AMENDED: 9/13/71



(NEW CLASS)

CLASS TITLE: CHIEF OF TECHNICAL SERVICES, ASSESSOR'S OFFICE

CODE: 4266

CHARACTERISTICS OF THE CLASS:

Under general direction, is responsible for the direction of the technical services section of the Assessor's office; coordinates assessment information between the Assessor's office, Tax Collector's office and the Data Processing sections of the Controller's office; supervises the activities of subordinate personnel engaged in such work; and performs related duties as required.

Requires responsibility for: Carrying out, interpreting and enforcing policy and methods relative to maintenance and processing of data and information, including conversion of existing and future procedures of the Assessor's office to Electronic Data Processing and preparation of the assessment rolls; making regular contacts with the general public, other departmental personnel and outside organizations and representatives relative to the preparation of assessment rolls; reviewing detailed property declarations, work papers and records; technical research, data analysis, and important detailed reports on technical assessment procedures problems.

EXAMPLES OF DUTIES:

1. Directs the record keeping operations of the Assessor's office including systems, data processing, property transfer and assessment control divisions.
2. Supervises the preparation of a wide variety of statistical records and reports relative to the preparation of assessment rolls, including corrections to the rolls and processing changes in property declarations and ownerships, including cuts and mergers of real property.
3. Coordinates the activities of various record keeping operations in processing assessment data in connection with printing the assessment rolls for each year; plans, assigns and supervises the preparation of block books, field maps and new subdivision maps.
4. Interviews the general public and representatives of outside organizations in order to resolve problems and questions concerning specific assessments.
5. Coordinates the work of the Assessor's office with those responsible for the design and implementation of computer-oriented office systems and procedures.
6. Determines eligibility and attaches the lien of personal property on the secured roll.
7. Supervises the maintenance of the master property records and the codification of parcels involved.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of a four year college or university with a baccalaureate degree, with major course work in public administration, accounting, economics, business administration, or a closely related field, supplemented by special course work in real estate appraisal.

Requires at least four years of progressively responsible experience in one or a combination of the following: Administrative analysis, systems analysis, organization and methods studies, accounting, auditing, or appraisal of real and personal property, including at least two years of supervisory experience; or an equivalent combination of training and experience.

CLASS TITLE: CHIEF OF TECHNICAL SERVICES, ASSESSORS'S OFFICE -continued

Knowledge, Abilities and Skills: Requires considerable knowledge of: The principles of organization and administration; the operations of the Assessor's office; the revenue and taxation codes, laws, ordinances and regulations applicable to assessments; modern office methods geared to automatic data processing techniques, machines, and knowledge of civil engineering drafting.

Requires considerable ability to: Plan, assign and supervise the work of subordinate personnel; deal effectively and tactfully with the general public; analyze and review detailed tax declarations, work papers and records in connection with tax assessment matters.

ADOPTED: 2/26/68

CLASS TITLE: PRINCIPAL REAL PROPERTY APPRAISER

CODE: 4267

CHARACTERISTICS OF THE CLASS:

Under general direction in an assigned area of activity, is responsible for the appraisal of all real property for tax purposes; performs unusual or difficult appraisal work; supervises the activities of subordinate personnel engaged in such work; and performs related duties as required.

Requires responsibility for: Assisting in coordinating, interpreting and enforcing existing evaluation methods and procedures in connection with real property appraisal activities; making regular contact with the general public, outside organizations and their representatives in furnishing and obtaining information on real property appraisals and tax assessment matters; preparing and reviewing detailed appraisal reports and records.

EXAMPLES OF DUTIES:

1. Plans, lays out and assigns work of subordinate appraisers in an assigned area; reviews and evaluates appraisal and valuation conclusions of subordinates.
2. Personally performs appraisals on problematical or unusual properties within an assigned area; analyzes and interprets leases and financial statements pertaining to tax exempt property.
3. Assembles and analyzes various data applicable to the valuation of real property.
4. Reviews and analyzes effect of income producing personal or intangible assets in relation to the assessment of high value real property; may survey tax exempt property in connection with possessory interest assessments.
5. Coordinates area or unit activities with those of adjoining areas or districts; prepares and reviews appraisal and progress reports.
6. Confers with taxpayers and/or their representatives for the purpose of resolving valuation problems and explaining the policies and procedures of the Assessor's office.
7. Represents the Assessor before the Assessment Appeals Board; required to appear as an expert witness before quasi-judicial and judicial bodies relative to specific appraisal and valuation conclusions.
8. Assists in the professional advancement of subordinate appraisal personnel.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of a four year college or university with a baccalaureate degree with major course work in engineering, architecture, business administration, real estate or a closely related field, supplemented by special courses in appraisal of real estate and real property assessment.

Requires four years of progressively responsible experience in the appraisal and evaluation of land, residential, commercial and industrial improvements, including one year of supervisory experience or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Requires considerable knowledge of the methods and practices utilized in the appraisal of land and improvements, including residential, commercial and industrial properties; the practices of structural cost estimating on residential, commercial and industrial improvements; revenue and taxation codes as applied to the appraisal of land and improvements.

Required to complete 24 hours of State approved appraisal training annually.

Requires considerable ability to: Analyze and interpret economic and environmental factors affecting land and improvement values; analyze and evaluate a variety of data on parcels of land and/or improvements and draw logical conclusions therefrom; prepare and maintain complete and accurate records of land and improvement appraisals; deal courteously, effectively and tactfully with the general public, outside organizations and their representatives.

License: Requires possession of a valid State Motor Vehicle Operator's License.

PROMOTIVE LINES:

To : 4269 Chief Real Property Appraiser

From: 4265 Senior Real Property Appraiser

ADOPTED: 3/9/67

AMENDED: 9/13/71

CLASS TITLE: ASSISTANT CHIEF REAL PROPERTY APPRAISER

CODE: 4268

CHARACTERISTICS OF THE CLASS:

Under general direction serves as principal assistant to the Chief Real Property Appraiser in directing the appraisal of all real property for assessment purposes, and for the final assessment of all land and improvements as they appear on the tax rolls; performs difficult and important real property appraisal work; and performs related duties as required.

Requires responsibility for: assisting in the development, co-ordination and execution of real property appraisal techniques and methods; making regular contact with the general public, outside organizations and their representatives relative to real property appraisal matters; preparing, checking and reviewing important appraisal and assessment reports and records.

EXAMPLES OF DUTIES:

1. Assists in supervising and participating in surveys relative to the maintenance of assessed values in relationship to market values of land and improvements.
2. Supervises and co-ordinates valuation of redevelopment and subdivision properties.
3. Participates in and reviews appraisals of the more difficult and complex properties.
4. Assists in the supervision and training of subordinates in estimating and appraising land and building costs.
5. Assists the Chief Real Property Appraiser in carrying out the functions of the department; acts for the Chief Appraiser in his absence; assists in compiling budgetary information for the department.
6. Assists in the design and development of new forms and procedures for appraisal work.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of a four-year college or university with a baccalaureate degree with major course work in engineering, architecture, public administration, economics, accounting or a closely related field, supplemented by special course work in real estate appraisal.

Requires five years of progressively responsible experience in land, building, and structure appraisal for tax assessment purposes, including two years of supervisory experience, or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Requires a general knowledge of: the methods and practices of appraisal of land and buildings including residential, commercial and industrial properties; statistical analyses used in standardizing appraisals; practices of structural cost estimating on land and improvements; revenue and taxation codes as applied to the appraisal of land and buildings.

Requires considerable ability to: plan and direct the land and building property appraisals; make difficult and complex appraisals of land and buildings; deal courteously and effectively with the general public, outside organizations and their representatives in connection with tax assessment work; analyze and resolve difficult tax problems.

CLASS TITLE: ASSISTANT CHIEF REAL PROPERTY APPRAISER
(Continued)

CODE: 4268

License: Requires possession of a valid state motor vehicle operator's license.

PROMOTIVE LINES:

To: 4269 Chief Real Property Appraiser

From: 4267 Principal Real Property Appraiser

ADOPTED: 3/9/67

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DEPARTMENT OF HUMAN RESOURCESJOB CODE TITLE: CHIEF APPRAISER
ASSESSOR'S OFFICEJOB CODE: 4269
Business Unit: COMMN**Definition:**

Under general administrative direction, is responsible for directing the appraisal of all real property for assessment purposes and for the final assessment of all land and improvements as they appear on the tax rolls; personally performs the most difficult and responsible real property appraisal work; is responsible for the proper assembly and coordination of all values in the total property appraisal; and performs related duties as required.

Distinguishing Features:

This job code works independently and is responsible for all appraisal of real property in the City & County of San Francisco. It is distinguished from the 4282 Chief Assistant Assessor in that the latter is responsible for the management of assessment standards in all the functions and operations of the Assessor's office.

Supervision Exercised:

Supervises subordinate staff.

Examples of Important and Essential Duties:

According to Civil Service commission Rule 109, the duties specified below are representative of the range of duties assigned to this job code and are not intended to be an inclusive list.

1. Supervises and participates in continuous surveys relative to maintaining assessed values in relationship to market values of land and improvements.
2. Examines, verifies, approves or amends appraisal recommendations of subordinate personnel.
3. Confers with realtors, appraisal firms, property owners, representatives, property owners and government organizations in connection with real property appraisal and assessment matters.
4. Supervises and trains subordinates in land and improvements, cost estimating and appraisal in connection with determining economic and market values of land and improvements.
5. Coordinates real property appraisal programs; supervises the maintenance of improvements, cost indices and depreciation schedules.
6. Directs the development of methods for appraising new, unique or unusually complex properties; directs the appraisal of highly complex properties or areas when values are challenged and require review.
7. Appears before various boards and agencies and provides information and explanations on land and improvements assessments; presents testimony at hearings and resolves major issues with Assessment Appeals Board and the State Board of Equalization.

**JOB CODE TITLE: CHIEF APPRAISER
ASSESSOR'S OFFICE**

**JOB CODE: 4269
Business Unit: COMMN**

8. Confers with Assessor in establishing policies concerning the evaluation of land and improvements and the maintenance of equal and uniform assessments.

9. Performs related duties as required.

Job Related and Essential Qualifications:

Knowledge of: the methods and practices or appraisal of land and all types of real property for tax assessment purposes; statistical analyses used in standardizing appraisals; economic and environmental factors affecting real property values; structure cost estimates on all types of buildings; revenue and taxation codes, laws, and regulations pertaining to the assessment of land and improvements.

Ability to: plan and standardize real property appraisal work; make real property appraisals of the most difficult and complex nature; develop methods and procedures to improve real property appraisal techniques, establish and maintain cooperative relationships with the general public, outside organizations and their representatives in connection with tax assessment work; analyze difficult evaluations and tax problems and effectively resolve such problems.

Training and Experience: Requires eight years of verified experience appraising real property, including at least three years of experience supervising the work of real property appraisers and possession of a valid driver's license.

Note: In accordance with the requirements of the California State Board of Equalization, appointees to the class must qualify for and receive a permanent State of California Appraiser's Certificate which must be renewed annually.

License: Possession of valid Driver's License.

Effective Date: 12/7/70

Amended Date: 3/2/01

Reason for Amendment:

To accurately reflect the current tasks, knowledge, skills and abilities defined in the most recent job analysis conducted for this job code.

CLASS TITLE: PRINCIPAL APPRAISER (SPECIAL VALUATIONS) JUN 16 1971 CODE: 4270

CHARACTERISTICS OF THE CLASS:

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Under general direction, performs specialized appraisal work in connection with possessory interest evaluations of governmental property leased to private organizations; performs appraisal work on a wide variety of divided property interests and special purpose properties; may exercise supervision over subordinate personnel; and performs related duties as required.

Requires responsibility for: Coordinating, interpreting and enforcing existing evaluation methods and procedures in connection with highly specialized property appraisal activities; making contact with organizations and representatives having an interest in special purpose and divided property interests; furnishes a wide variety of information on property appraisal and tax assessment matters; preparing detailed reports and records.

EXAMPLES OF DUTIES:

1. Surveys and evaluates tax exempt land in connection with possessory interest assessments; analyzes and interprets leases pertaining to tax exempt property.
2. Analyzes and interprets financial statements of tax exempt property subject to possessory interest assessments.
3. Analyzes and evaluates divided property interests such as air rights, sub-surface rights, water rights and leasehold interest and improvements on tax exempt land.
4. Analyzes and evaluates special purpose properties including convention centers, grain terminals, wharves and piers, dry docks and recreation areas.
5. Personally performs appraisal work on divided property interests and special purpose properties.
6. Meets with and discusses assessment and evaluation problems with representatives of the general public, representatives of outside organizations and departmental personnel.
7. May represent the Assessor before legislative bodies and public boards concerned with special property interest problems.
8. Supervises subordinate clerical and appraisal personnel.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of a four year college or university with a baccalaureate degree with major course work in engineering, architecture, public administration, economics or accounting, or closely related fields, supplemented by special courses in appraisal of real estate and real property assessment.

Requires four years of progressively responsible experience in the appraisal and evaluation of land, residential, commercial and industry buildings, including one year of supervisory experience; or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Requires comprehensive knowledge of: The methods and practices utilized in the appraisal of special purpose property interests, buildings and lands, including possessory interest assessments, revenue, taxation codes and all laws relating to appraisal and assessment of properties and lands.

Requires considerable ability to: Analyze, interpret and evaluate economic and environmental factors affecting a wide variety of property interests; analyze and evaluate data on buildings, lands and other properties for tax assessment purposes; prepare and maintain complete and accurate records on assessment work; deal effectively and tactfully with the general public, outside organizations and their representatives.

License: Requires possession of a valid state motor vehicle operator's license.

PROMOTIVE LINES:

To : 4269 Chief Real Property Appraiser

From: 4265 Senior Real Property Appraiser

ADOPTED: 5/24/71



SAN FRANCISCO CIVIL SERVICE COMMISSION

CLASS TITLE: ADMINISTRATIVE ASSISTANT TO THE ASSESSOR

CODE: 4280

CHARACTERISTICS OF THE CLASS:

Under general administrative direction, acts as a principal assistant to the Assessor and the Chief Assistant Assessor in the performance of important public relations activities, administrative duties and functions of the Assessor's Office; represents the Assessor at conferences and hearings; and performs related duties as required.

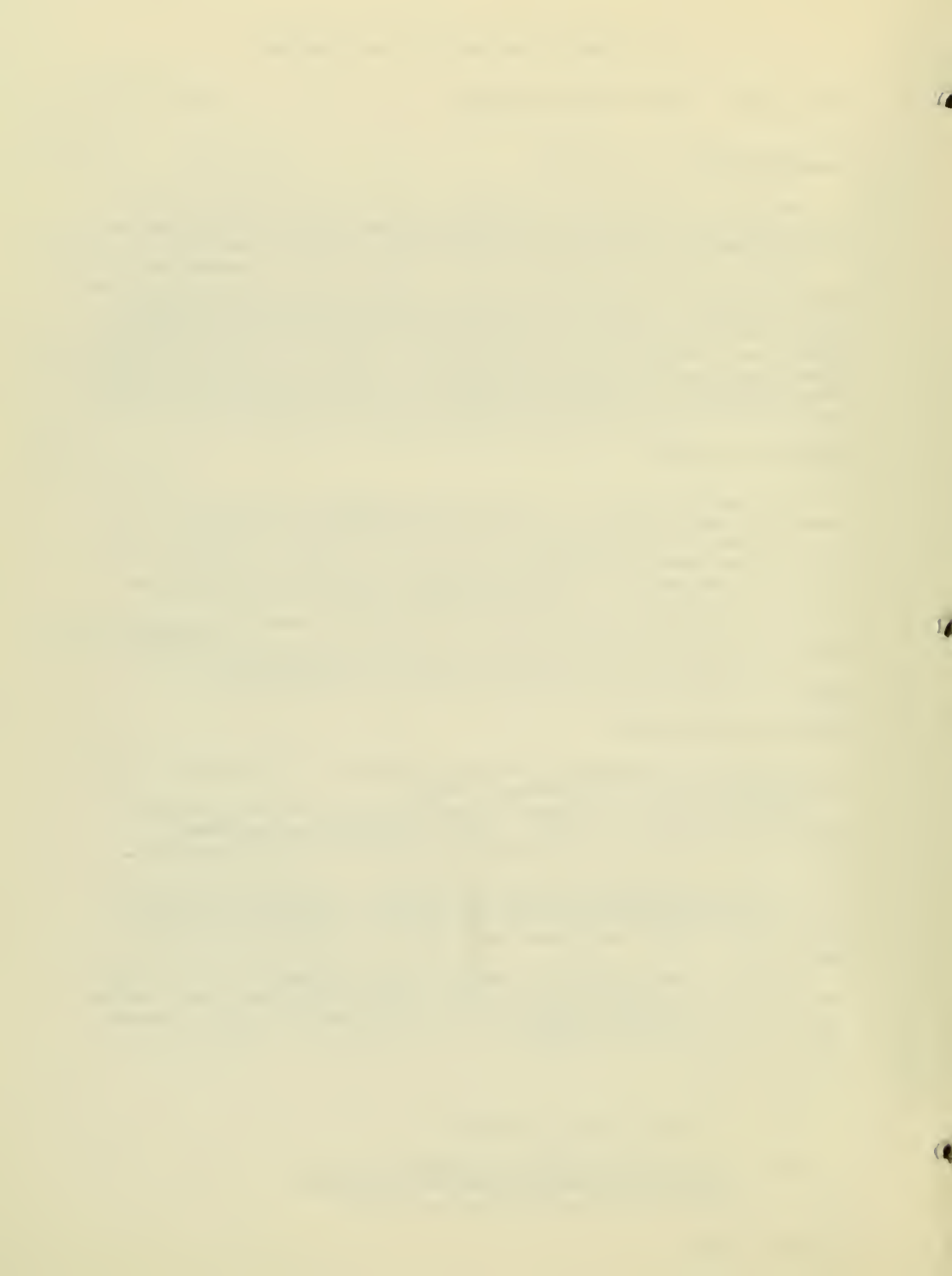
Requires responsibility for: carrying out, interpreting, co-ordinating and enforcing policy and methods concerning public relations, general administrative matters and conversion of existing procedures to Electronic Data Processing as related to the Assessor's Office; frequent important personal contacts with legislative groups and committees, taxpayers and their representatives and with administrative officials of other governmental jurisdictions; technical research and data analysis; assisting in budget development, and submitting important detailed reports on a variety of assessment problems.

EXAMPLES OF DUTIES:

1. Is responsible for the general direction of all units and sections of the Assessor's Office except the technical and professional activities in relation to the valuation of real and personal property.
2. May, as assigned, assume the duties and responsibilities of Chief Assistant Assessor in his absence.
3. Has responsibility for planning and co-ordinating the systems and procedures with respect to Electronic Data Processing functions and data flow in the office; confers with division heads relative to improvements in methods and procedures; develops manuals of internal procedures; initiates efficiency surveys of current procedures and forms, and recommends revisions when necessary.
4. Assists in the preparation, compilation and justification of budget requests; assists in the presentation of budget to the Mayor and Board of Supervisors.
5. Co-ordinates the activities of the Assessor's Office with other county offices; serves as liaison with Division of Assessment Standards, State Board of Equalization regarding procedures, forms and programs.
6. Analyzes the effect of current and proposed legislation and court cases; initiates recommendation for legislative programs.
7. Confers with taxpayers and representatives of private interests regarding assessment problems; performs or supervises the gathering of data and prepares reports on assessments or projects affecting the tax base; prepares releases for the press or television.
8. Represents the Assessor at budget hearings and State Legislature committee hearings; makes technical presentations before State or National Conference of Assessors; prepares and delivers talks on assessment procedures before service organizations.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of a four-year college or university with a baccalaureate degree, with major course work in public administration, business administration, political science or accounting.



SAN FRANCISCO CIVIL SERVICE COMMISSION

CLASS TITLE: ASSESSOR

CODE: 4290

CHARACTERISTICS OF THE CLASS:

As an elected official responsible to the electorate, and subject to executive approval and the legislative body with respect to budgets, purchasing, and other functions and activities, serves as assessor for the city and county; carries out the responsibilities required of this office by the state constitution, revenue and tax code, charter provisions and other regulatory measures; and performs related duties as required.

Requires major responsibility for: developing, approving and executing all policies and procedures relating to the responsibilities of the office; assuring the city and county properly receives large amounts of revenue through the proper assessment and collection of property taxes; making continuous responsible personal contact with governmental officials, legislative bodies and outside groups and organizations in connection with the handling of the office responsibilities; directing the preparation of the tax roll and a wide variety of related specialized reports and documents involving the assessment activities of the city and county.

EXAMPLES OF DUTIES:

1. Directs and coordinates all tax assessment activities of the city and county and the legal and administrative processes necessary to the preparation of the annual tax rolls and the collection of tax revenue.
2. Directs and coordinates the activities of the office with other municipal, state and federal agencies.
3. Directs the preparation of a departmental budget and the approval of subsequent expenditures of funds.

NOTE: As this position is an elective office of the city and county, no "MINIMUM QUALIFICATIONS" and "PROMOTIVE LINES" are included in this specification.

SAN FRANCISCO CIVIL SERVICE COMMISSION

CLASS TITLE: TAX APPEALS BOARD ADMINISTRATOR

CODE: 4292

CHARACTERISTICS OF THE CLASS:

Under general direction of the Clerk of the Board of Supervisors, assists in supervising the activities of personnel engaged in providing administrative and clerical services to the Tax Appeals Board; and performs related duties as required.

Requires responsibility for: the developing of office procedures and methods concerning processing of property assessment appeals; implementing the directives and actions of the Tax Appeals Board; making regular important contact with city officials, the general public, and outside organizations on tax appeal matters; preparing and reviewing reports and records.

EXAMPLES OF DUTIES:

1. Directs and supervises the formulation and operation of the tax appeals program.
2. Plans, assigns and directs the activities of subordinate personnel engaged in the preparation of forms; processing and distribution of petitions for equalization; maintenance and filing of records.
3. Attends Tax Appeals Board meetings as required.
4. Advises petitioners of actions taken by the Tax Appeals Board.
5. Provides information on tax appeals matters to members of the Board of Supervisors, various departments and the general public.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of a four-year college course with a baccalaureate degree, with major course work in public or personnel administration, business administration or closely related fields, or completion of high school, supplemented by at least five years of progressively responsible administrative experience, dealing with assessment procedures, property title searching, or the transfer or indexing of property, of which two years must have been at a responsible supervisory level; or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Requires comprehensive knowledge of: office management and supervisory techniques and methods, applicable laws, rules and regulations pertaining to the activities of the Board, and parliamentary procedures.

Requires considerable ability to: plan, assign and supervise the work of subordinate personnel; deal effectively, tactfully, and courteously with city officials and the general public; prepare accurate and concise reports.

PROMOTIVE LINES:

No normal lines of promotion

ADOPTED: 2/16/67



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SAN FRANCISCO
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DEPARTMENT OF HUMAN RESOURCES****4294 ADMINISTRATOR, ASSESSMENT APPEALS BOARD****Definition:**

Under general direction, the Administrator, Assessment Appeals Board supervises the activities of personnel engaged in providing administrative and clerical support to the Assessment Appeals Board (AAB). The essential functions of the job include: scheduling hearings and reviewing appeals; maintaining listing of results of Board meetings and advising all interested parties of action taken by the Board; acting as a liaison between the Assessment Appeals Board, the Assessor, and the Clerk of the Board; preparing, distributing, reviewing and maintaining different reports and information on the activities of the Assessment Appeals Board for submission to the Controller and the Board of Supervisors; supervising and evaluating staff; and developing relevant policies and procedures.

Distinguishing Features:

This is a single position class in the City. The Administrator, Assessment Appeals Board, performs administrative functions and directs the activities performed by staff assigned to the unit.

Supervision Exercised:

Incumbent in this position directs and supervises the activities of staff assigned to the Assessment Appeals Board.

Examples of Important and Essential Duties:

According to Civil Service Commission Rule 9, the duties specified below are representative of the range of duties assigned to this job code (class) and are not intended to be an inclusive list.

1. Schedules hearings, notifies all interested parties, composes calendars, and processes petitions. Reviews all appeals for accuracy and completeness.
2. Maintains listing of results of Board meetings and journal of proceedings, and advises all interested parties of action taken by the AAB. Submits various reports, evaluations and documents to the Tax Collector, Assessor, Controller and Board of Supervisors.
3. Acts as a liaison between the Assessment Appeals Board, the Assessor and the Clerk of the Board in order to keep the respective groups informed.
4. Reviews and maintains records such as tapes, appeal logs, files, and correspondence.
5. Prepares statistical reports and information on activities of the Assessment Appeals Board for the Board of Supervisors and the public. This includes editing and distributing findings of facts as requested by petitioners.

6. Supervises, coordinates and evaluates the work performed by assigned staff. This includes the ability to select, train and motivate staff when necessary.
7. Develops relevant policies and procedures for the Assessment Appeals Board.
8. Performs related duties as assigned.

Job Related and Essential Qualifications:

Knowledge of: office management techniques and methods; and knowledge of applicable laws, rules and regulations pertaining to the activities of the Assessment Appeals Board.

Ability to: provide strategic planning; implement, organize, and maximize efficiency level of resources; supervise staff; maintain effective working relationships with city officials, appellants, Assessor, Tax Collector, Assessment Board, Clerk of the Board and the public; prepare accurate reports, evaluations, letters and public information documents; operate personal computer and its applications; and communicate in a clear and concise manner verbally and in writing with the staff and the public in general.

Experience and Training Guidelines:

Training: Possession of a baccalaureate degree from an accredited college or university, with major coursework in public administration, business administration or closely related field;

AND,

Experience: Two (2) years of progressively responsible administrative experience.

Substitution: Professional experience in real estate, e.g. appraising property or financial management may be substituted for the required education on a year for a year basis. (One year of experience will be considered equivalent to 30 semester/45 quarter units of college coursework.)

AMENDED: 8/15/77

AMENDED: 8/27/99; 10/22/99

Reason for Amendment: To accurately reflect the current tasks, knowledge, skills and abilities defined in the most recent job analysis conducted for this job code (class.)

SAN FRANCISCO CIVIL SERVICE COMMISSION

CLASS TITLE: CAFETERIA CASHIER CLERK

CODE: 4302

CHARACTERISTICS OF THE CLASS:

Under supervision, is responsible for receiving, recording and depositing cashier's receipts from the City College and Central Office cafeterias; and performs related duties as required.

Requires responsibility for: preventing moderate losses through the proper handling and accounting of cash receipts.

EXAMPLES OF DUTIES:

1. Receives, tallies and prepares the cafeteria receipts for bank deposit.
2. Prepares register reports of cash and sales.
3. Fills registers with change and cashier forms.
4. Balances change fund and requests cash as needed.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of high school, supplemented by two years' experience in the operation of a cash register and in tallying receipts; or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Requires knowledge of: simple bookkeeping procedures.

Requires ability to receive and account for large amounts of change.

Requires skill in performing arithmetic computations with speed and accuracy.

PROMOTIVE LINES:

To: Collections Clerk
Clerk

From: Original entrance examination

AMENDED: 2/11/65



SAN FRANCISCO CIVIL SERVICE COMMISSION

CLASS TITLE: COLLECTION OFFICER

CODE: 4306

CHARACTERISTICS OF THE CLASS:

Under supervision, performs specialized revenue collection work relative to the collection of delinquent monies owed the city; and performs related duties as required.

DISTINGUISHING FEATURES:

This class is the journey level in the Collection series. Employees research, obtain and evaluate information to determine a debtor's ability to pay and make arrangements for payment of money owed to the City and County. The next higher class of Senior Collection Officer is the advanced level which is responsible for the more difficult collection work and may exercise lead worker responsibilities.

EXAMPLES OF DUTIES:

"The class specification shall be descriptive of the class and shall not be considered a restriction on the assignment of duties not specifically listed." (CSC Rule 7)

EXAMPLES OF DUTIES:

1. Reviews and inspects a wide variety of sources, documents and records to obtain evidence and information necessary to locate persons owing monies to the city.
2. Prepares summaries of data and information acquired from various sources for use in the location of delinquent persons or the preparation of legal processes to collect money due.
3. Contacts a variety of outside organizations in locating assets of individuals owing money to the city.
4. Types and mails statements to individuals and businesses owing monies to the city and maintains records for follow-up collections.
5. Prepares and processes creditors' claims and special notices on probate cases, claims of first liens on hospital cases, and workers' compensation liens on job related injury cases.
6. Receives payment on delinquent accounts; issues receipt for same and deposits money with cashier.
7. Prepares and types a wide variety of form letters and notices relative to the collection of delinquent accounts; maintains records of such accounts.
8. Provides information to the public on the payment of taxes, delinquent accounts and license fees; may assist, during rush periods, in the collection and processing of unsecured and/or real property taxes.
9. May represent the City and County as plaintiff in small claims court.

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CLASS TITLE: COLLECTION OFFICER

CODE: 4306

QUALIFICATIONS:

"The examination announcement shall provide the qualifications...and other particulars...Applicants must be guided solely by the announcement of the examination for which they apply." (CSC Rule 9)

Knowledge, Abilities and Skills: Good knowledge of: Interviewing and telephone communication techniques; modern office methods and techniques and the use of common office machines and equipment; the applicable laws, rules and regulations pertaining to delinquent revenue and tax collections.

Ability to: maintain records and prepare ordinary reports; use skip tracing techniques to locate debtors; deal effectively and courteously with the general public.

ADOPTED: 1/12/61

AMENDED: 4/21/86

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CITY AND COUNTY OF SAN FRANCISCO
DEPARTMENT OF HUMAN RESOURCES

AUG 11 1999

4308 Senior Collections Officer

SAN FRANCISCO
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The Senior Collections Officer performs responsible and specialized revenue collection work involving revenues due the City and County; is responsible for collection through personal and telephone contact, correspondence and legal action; sets up repayment schedules; maintains collection records; explains County policies and legal requirements; and performs related duties as required.

Distinguishing Features:

This class is the advanced-journey-level in the Collection officer series. Positions are distinguished from the next lower code of Collection Officer in that they perform the more difficult account collection work and may exercise lead direction over the latter class. Class 4366 Collection Supervisor is the full supervisory level in the series.

Supervision Exercised:

May provide lead direction to subordinate collections personnel.

Examples of Important and Essential Duties:

According to Civil Service commission Rule 9, the duties specified below are representative of the range of duties assigned to this job code, class, and are not intended to be an inclusive list.

1. Collects delinquent and non-delinquent accounts through correspondence and personal contact with debtors; sets up repayment schedules.
2. Uses skip-tracing techniques, including communications with various agencies and the public, to obtain information to locate debtors.
3. Interviews and corresponds with debtors to elicit payments and explain County policies and legal requirements.
4. Obtains and verifies information relating to debtor's employment, earnings, property, credit, bank accounts, assets, liabilities and similar information.
5. Prepares accounts for legal enforcement, including developing case summaries, obtaining evidence and consulting with attorneys, claims adjusters, other County departments and outside agencies.
6. May represent the City and County as plaintiff in small claims court.
7. Maintains records of data and information on cases.
8. May provide lead direction subordinate collections personnel.
9. Performs related duties and responsibilities as assigned.

Job Related and Essential Qualifications:

Knowledge of: general principles and techniques of collection work; legal requirements for collection of delinquent accounts; modern office practices and procedures.

Ability to: Conduct informational interviews; write and speak clearly and effectively; research legal, financial and other records; use skip tracing techniques; deal tactfully with clients; compose clear, concise reports and correspondence; establish and maintain accurate records and accounts.

Experience and Training Guidelines:

1. Two years of collection experience in a public agency. This experience must involve collection work equivalent to that performed by Class 4306 Collections Officer in the City and County of San Francisco;
OR
2. Three years of private sector collection experience in collecting delinquent accounts;
OR
3. An equivalent combination of experience;
AND
4. Ability to type 35 wpm.

Special Requirements:

Essential duties require the following physical skills and work environment; ability to work in a standard office environment, which may involve prolonged sitting, bending and operation of typing, word processing and other office equipment; interact with and obtain information from hostile individuals.

Effective Date: 3/1/96

Amended Date: 7/23/99

Reason for Amendment:

To accurately reflect the current tasks, knowledge, skills and abilities defined in the most recent job analysis conducted for this job code.

CITY AND COUNTY OF SAN FRANCISCO
DEPARTMENT OF HUMAN RESOURCES

JOB CODE TITLE: COMMERCIAL DIVISION ASSISTANT SUPERVISOR

JOB CODE: 4310
Business Unit: COMMN

DEFINITION:

Under direction, assists in the overall administration of a large operating section of the Public Utilities Commission's Customer Service Bureau. Assists in the supervision and coordination of work activities of subordinates involved in the maintenance of customer services, records and accounts. Positions in the electric and gas billing specialty are responsible in all aspects of billing and collection of retail gas and electric services using a newly developed utility billing system.

DISTINGUISHING FEATURES:

The Commercial Division Assistant Supervisor works under the supervision of Class 4311 Customer Service Billing and Collections Supervisor. Job code 4310 is distinguished from job code 1480 Principal Water Services Clerk by its responsibility for assisting in the supervision of the operations of an entire section of the Customer Service Bureau's Commercial Division section.

SUPERVISION EXERCISED:

The Commercial Division Assistant Supervisor will supervise subordinate staff.

EXAMPLES OF IMPORTANT AND ESSENTIAL DUTIES:

According to Civil Service Commission Rule 9, the duties specified below are representative of the range of duties assigned to 4310 Commercial Division Assistant Supervisor and are not intended to be an inclusive list.

1. Performs difficult and complex billing and collection activities in connection with establishing and maintaining consumer's gas, electric, water and sewer services.
2. Supervises in planning, assigning and inspecting the work of subordinate staff in establishing and maintaining consumer water service, current accounts, closed accounts and collections.
3. Prepares and maintains a wide variety of complex records, reports and documents relating to financial, statistical and operational records.
4. Prepares budget revenue forecasts and budget variance reports.
5. Interprets, implements and administers existing policies, rules and regulations, and procedures as they relate to gas services, electric services, utility rate structure, consumer accounts, billing and collection processing.
6. Interacts with other departmental personnel, the general public and other outside agencies in connection with gas and electric services.
7. Participates in continuous review of all customer accounts; screens past-due bills and directs the preparation and mailing of delinquent notices and collection letters.
8. Furnishes information to operating personnel concerning service installations of abandoned properties and inactive services which may cause damage to public or private property; coordinates the maintenance of complete service records of active and inactive services and their locations and the maintenance of related maps on which such services are recorded.
9. Assumes full supervision of the staff in the absence of the Customer Service Billing and Collections Supervisor.

JOB RELATED AND ESSENTIAL QUALIFICATIONS:

Knowledge of: Customer Service Bureau operations and water department rules and regulations.

Ability to: supervise and assist in successfully organizing and directing important office operations; analyze situations and make decisions; deal in a cooperative manner with individual customers and the general public.

Skill in: oral and written communication.

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JOB CODE TITLE: COMMERCIAL DIVISION ASSISTANT SUPERVISOR

JOB CODE: 4310

Business Unit: COMMN

EXPERIENCE AND TRAINING GUIDELINES:

For positions in the Electric and Gas billing specialty:

1. Possession of a bachelor's degree from an accredited college or university with major coursework in Business Administration, Accounting, Finance, Information Systems, Mathematics, or related field; AND
2. Three (3) years senior-level work experience in complex billing and collection processing functions.

Substitution: Additional qualifying experience may substitute for the required degree on a year-for-year basis.

For non-specialty positions:

Three (3) years senior-level clerical experience in customer service or billing and collection in a large utility or public works organization. At least one (1) year of this experience must have been in a supervisory capacity. Experience must include the use of data processing methods which analyze customer accounts for either the billing and collection activities or in providing, establishing and maintaining customer services.

Substitution: One (1) year of college or university coursework majoring in business or accounting (i.e. a minimum of 30 semester or equivalent units with at least 12 units in major subject area) may be substituted for one year of senior-level, non-supervisory clerical experience.

Effective: June 4, 1979

Amended: April 28, 2000

Reason for Amendment: To accurately reflect the current tasks, knowledge, skills and abilities defined in the most recent job analysis conducted for this job code.

**CITY AND COUNTY OF SAN FRANCISCO
DEPARTMENT OF HUMAN RESOURCES**

**JOB CODE TITLE: CUSTOMER SERVICE BILLING AND JOB CODE: 4311
COLLECTIONS SUPERVISOR Business Unit: COMM**

DEFINITION:

Under general direction, administers and supervises the activities and personnel of either a large operating section of the Public Utilities Commission's Customer Service Bureau or a division of the Treasurer/Tax Collector's Office; plans, directs and coordinates the work of subordinate staff involved in the maintenance of customer and taxpayer services' records and accounts; and performs related duties as required.

DISTINGUISHING FEATURES:

Incumbents in this job code are responsible for supervision of either the Customer Service Section or the Customer Accounts Section of the Public Utilities Commission Customer Service Bureau or an operating division of the Treasurer/Tax Collector's Office. This code will develop, direct, interpret and enforce policies and procedures relating to Water Department customer billing and collections, customer complaints and request for services or Treasurer/Tax Collector's cashiering or remittance operations.

SUPERVISION EXERCISED:

The incumbent supervises subordinate staff.

EXAMPLES OF IMPORTANT AND ESSENTIAL DUTIES:

According to Civil Service Commission Rule 9, the duties specified below are representative of the range of duties assigned to this job code.

1. Plans, assigns, supervises and inspects the work of subordinate personnel to ensure operational efficiency as well as conformance with departmental policies, procedures, laws and regulations.
2. Directs and prepares more complex financial, statistical and operational reports and records; supervises the preparation of financial, statistical and operational records including customer bills, service records and collection accounts.
3. Informs the general public, City departments, contractors, banking officials or other interested parties of departmental policies, rules and regulations; recommends changes in policies and procedures to increase operational efficiency or improve customer relations and services.
4. Supervises customer service operations to ensure problems or issues are effectively resolved; supervises or conducts investigations where required; or may make necessary adjustments as required.
5. Coordinates section or division operations including complex technical issues consisting of, as applicable to section or division, various types of accounts, new services, deposits, receipts, taxes, bonds, collections, disbursements and reporting activities with other areas or agencies; monitors citywide wire system.
6. Performs duties as required.

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**JOB CODE TITLE: CUSTOMER SERVICE BILLING AND
COLLECTIONS SUPERVISOR**

**JOB CODE: 4311
Business Unit: COMM**

IN THE PUBLIC UTILITIES COMMISSION'S CUSTOMER SERVICE BUREAU:

7. Responsible for the processing of orders for new services, including determining size of meters etc., lay-out of all services, availability of mains, pressure and size of services. Supervises and directs subordinates in the maintenance of customer accounts regarding the billing and collection of utility service charges, including the delinquency process or various payment alternatives such as on-site cashiers, electronic payments methods and payment stations.

IN THE TREASURE/TAX COLLECTOR'S OFFICE:

8. Supervises all city departmental accounts by acting as the central banking authority; makes regular contacts with various departmental personnel, banks, public agencies and clientele in connection with issues such as discrepancies, purchases of currency, forgeries, shortages, and bad checks; directs the postings of interest, initiates stop payments or service charges to City accounts.

JOB RELATED AND ESSENTIAL QUALIFICATIONS:

Knowledge of: Applicable city and departmental policies and procedures; methods and procedures of handling and accounting for large sums of money; customer service techniques. In the Treasurer/Tax Collector's office, methods and procedures of handling and accounting for large sums of money or warrants for city services; customer service techniques; general municipal finance and banking procedures and processes.

Ability to: Compile and analyze data to make sound evaluations; use computerized programs; supervise and organize detailed work.

EXPERIENCE AND TRAINING GUIDELINES:

Five years of verifiable senior-level clerical experience in customer service and/or billing and collections in a large utility or public works organization. At least two years of this senior-level clerical experience **MUST** have been in a supervisory capacity. Experience must include use of data processing methods which analyze customer accounts for either billing and collections activities and establishing/maintaining customer services.

SUBSTITUTION: One year of college or university coursework majoring in business or accounting or 30 semester units or equivalent units with at least 12 units in major subject area may be substituted for one year of senior-level clerical experience. Applicants who use this substitution must submit a copy of their transcript or degree at the time of filing.

EFFECTIVE DATE: 6/4/79

AMENDED: 2/17/00

REASON FOR AMENDMENT: To accurately reflect the current tasks and the knowledge, abilities and skills defined in the most recent job analysis conducted for this job code.

SAN FRANCISCO CIVIL SERVICE COMMISSION

CLASS TITLE: BOND AND COUPON SUPERVISOR

CODE: 4312

CHARACTERISTICS OF THE CLASS:

Under direction, performs difficult and responsible clerical and office work relative to the processing of bond interest and redemption payments for the treasurer's office; supervises activities of assigned personnel during certain phases of such work; and performs related duties as required.

Requires responsibility for: explaining and carrying out existing methods and procedures relative to the processing of bond interest and redemptions; making regular contacts with the general public, other departmental personnel and outside organizations and representatives in connection with the processing of bonds and coupons; preparing, checking and reviewing important detailed and complex financial data and records relative to the process of bonds and coupons.

EXAMPLES OF DUTIES:

1. Receives bonds and coupons from local banks and individuals and assures that such bonds and coupons are in proper order.
2. Checks and lists bonds and coupons received from fiscal agencies and processes such bonds and coupons for payment.
3. Prepares daily recapitulations and distribution of bonds and coupons for the controller's office; prepares cash summaries of bonds and coupons paid.
4. Supervises and participates in the cutting of registered interest coupons and processes for payment to owners; verifies interest due and pays tax anticipation notes on maturity.
5. Is responsible for the cutting and processing of collateral bonds and coupons; processes the cancelation of matured bonds and coupons.
6. Supervises the processing of the retirement system bonds and the cutting of the coupons, and the preparing of a list for submission to banks for collection.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of high school, supplemented by at least six years of progressively responsible clerical and office experience, preferably including experience in financial and accounting work related to the handling of securities and including some supervisory experience; or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Requires considerable knowledge of: mathematics, particularly as applied to the methods of calculating interest; accounting and office methods and techniques; existing laws, ordinances and regulations governing the handling and processing of bonds and coupons.

CLASS TITLE: BOND AND COUPON SUPERVISOR
(continued)

CODE: 4312

Requires considerable ability to perform detailed and complex clerical work with a high degree of accuracy; deal effectively and courteously with other departmental personnel, the general public and outside organizations.

Requires considerable skill and accuracy in making mathematical and bond interest calculations.

PROMOTIVE LINES:

To: Chief Assistant Treasurer

From: Cashier, Treasurer

SAN FRANCISCO CIVIL SERVICE COMMISSION

CLASS TITLE: PROPERTY TAX SUPERVISOR

CODE: 4316

CHARACTERISTICS OF THE CLASS:

Under general direction, supervises the work of a bureau of the Tax Collector's Office engaged in preparing, distributing and posting real and personal property tax bills; supervises the preparation of delinquent tax rolls; directs tax-deeded process and auction of tax-deeded property; answers inquiries regarding tax procedures; answers inquiries regarding tax procedures; and performs related duties as required.

Requires responsibility for: Carrying out, coordinating and enforcing existing policies and methods involved in the processing of real and personal property tax bills; making responsible contacts with representatives of business establishments and the general public; requires supervisory responsibility for important operational and financial records.

EXAMPLES OF DUTIES:

1. Plans, assigns and supervises the preparation and distribution of real property and personal property tax bills.
2. Inspects tax bills before distribution to determine if the total balance equals that shown on tax rolls.
3. Supervises the posting of tax payments to the tax rolls and the preparation of the balance sheet for payments posted; prepares a monthly statement for monies collected on real and personal property taxes; adjusts erroneous payments made by tax payers which involve the transfers from one account to another.
4. Makes necessary adjustments to rolls in cases where a reassignment of values to an already issued bill occurs.
5. Supervises the publication of the delinquent tax roll and the preparation of all statements pertaining to payment or lack of payment on delinquent taxes.
6. Answers inquiries from taxpayers, banks and mortgage companies regarding real property taxes; confers with representatives of the Assessor's Office and other departments on problems relating to the coordination of work and exchange of information.
7. Renders legal notifications to tax-delinquent owners prior to forcible divestment of their property; publishes such action in newspaper; prepares and records tax collector deeds; notifies interested State and County offices.
8. Plans, directs and supervises the auction sale of tax-deeded property; obtains authority from State and local offices; publicizes sale in newspapers; notifies interested parties; computes tax amounts; holds sale; prepares deeds to successful bidders; prepares necessary reports.
9. Requisitions personnel and supplies necessary for office operation.

MINIMUM QUALIFICATIONS;

Training and Experience: Requires completion of high school, supplemented by five years of increasingly responsible clerical experience, including two years in work involving the processing of property tax data in a public agency; or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Requires good knowledge of: The practices, procedures and laws relative to the preparation, distribution and posting of property tax bills; modern office methods, including governmental accounting procedures; real estate terminology and practices.

CLASS TITLE: PROPERTY TAX SUPERVISOR

CODE: 4316

MINIMUM QUALIFICATIONS: - Continued

Requires ability to: Supervise and coordinate the work of a clerical staff engaged in the processing of property tax bills; interpret applicable laws and rules to subordinates and the general public; deal firmly but courteously with business representatives and the general public.

PROMOTIVE LINES:

To : 4348 Delinquent Revenue Supervisor
4372 Cashier, Tax Collector's Office

From: 1408 Principal Clerk
1632 Senior Account Clerk

AUG 25 1999

4320 CASHIER I

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Definition:

Under supervision, the Cashier I, receives receipts for and deposits money in varying amounts. The essential functions of this job include: receiving daily deposits and payments from individuals, corporation, federal, state and local governments; inspecting currency, checks, warrants and other financial instruments for completeness and accuracy; applying payments to proper tax types or accounts; reconciling daily collections including checks, cash and/or warrants to appropriate records/accounts; maintaining daily balance sheets on all transactions; and providing services to customers in person or over the phone in a professional and courteous manner.

Distinguishing Features:

The Cashier I, is the entry level position to the series. The nature of this position requires extensive public contact, ability to type 25 wpm and use a 10 key adding machine by touch.

Supervision Exercised:

None.

Examples of Important and Essential Duties:

According to Civil Service Commission Rule 9, the duties described below are representative of the range of duties assigned to their job (Class) and are not intended to be an inclusive list.

1. Receives daily deposits and payments from a wide variety of sources; counts cash, checks and warrants received to assure amounts balance with receipts.
2. Inspects monies received for accuracy and correctness; prepares necessary forms for transmitting funds for deposit.
3. Maintains daily work sheets for all transactions.
4. Reconciles daily collections in order to assure that money for deposit is allocated to proper tax types or accounts.
5. Applies payments to proper tax types or accounts.
6. Processes large volume of payments.
7. Provides services to customers in person or over the phone.
8. May maintain revolving funds for payment of bills and the purchase of supplies.

Job related and Essential Qualifications:

Knowledge of: handling and accounting for varying amounts of money; checks, credit card/debit card or other financial instrument for their proper validation and endorsement.

Ability to: inspect daily deposits for counterfeit, make change and issue receipts rapidly and accurately; make simple arithmetical calculations; deal effectively and courteously with the public; solve problems in reconciling daily collections; read and comprehend written instructions; operate a personal computer and a 10-key adding machine by touch.

Experience and Training Guidelines:

Experience:

1. One (1) year of verifiable experience as a cashier receiving daily deposits, applying payments to proper accounts and reconciling daily collections. Experience must have been gained within the last five (5) years; **AND**
2. Ability to type/keyboard 25 words per minute; **AND**
3. Ability to use a 10-key adding machine by touch.

Amended: 12/4/72 (Consolidates class 4320 Teller)

Amended: 8/6/99

Reason for Amendment: To accurately reflect the current tasks, knowledge, skills and abilities defined in the most recent job analysis conducted for this class.

SAN FRANCISCO CIVIL SERVICE COMMISSION

(NEW CLASS)

CLASS TITLE: CASHIER II

CODE: 4321

CHARACTERISTICS OF THE CLASS:

Under general supervision, receives, disburses and accounts for large sums of money in connection with the payment of various types of bills; performs clerical work of average difficulty in the preparation and maintenance of related records; may exercise limited supervision over clerical staff; and performs related duties as required.

Requires responsibility for: Interpreting and carrying out existing methods and procedures relative to handling large amounts of money; dealing effectively and courteously with other departmental employees and the general public; the maintenance of records and reports reflecting the receipt and deposit of monies.

EXAMPLES OF DUTIES:

1. Receives deposits of cash, checks, warrants and negotiable instruments from City departments as well as from other private and public sources; examines all checks, warrants and other financial instruments for accuracy according to the negotiable instruments laws.
2. When assigned to Treasurer's office, may be required to pay out money from cash accounts against authorized demands, money for jury fees, welfare, miscellaneous payments, and cashing of warrants.
3. Checks currency received for counterfeit bills; depending on assignment, may receive warrants from clearing houses with the responsibility to handle according to specific procedures.
4. Keeps daily balance sheets of all money paid out; assures that disbursements are accurately posted to the proper cash account.
5. May check monies received by subordinate personnel against receipts and various amounts.
6. May arrange checks, drafts and money orders in appropriate sequence for deposit; prepares deposit slips and receipts for active unverified deposits.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of high school supplemented by at least three years of experience in the handling of money in a public or private organization; or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Requires good knowledge of: The methods and procedures of handling and accounting for money; appropriate laws and regulations applied to the collection and disbursement of City funds; checks, bonds, and other negotiable instruments and their proper validation and endorsement.

Requires ability to: Perform arithmetical calculations with speed and accuracy; handle cash, checks and warrants with accuracy; requires some supervisory ability.

PROMOTIVE LINES:

To : 4322 Cashier III

From: 4320 Cashier I

ADOPTED: 12/4/72

(Consolidates classes 4380 Cashier, Treasurer & 4360 Asst. Cashier, Water Dept.)



CITY AND COUNTY OF SAN FRANCISCO
DEPARTMENT OF HUMAN RESOURCES

AUG 11 1999

4322 Cashier III

SAN FRANCISCO
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Under direction, supervises personnel responsible for the receipt and/or disbursement of and accounting for large amounts of money; personally receives and/or disburses large amounts of money; may act as department cashier in supervising the receipt, balancing and accounting for large amounts of money.

Distinguishing Features:

This is the advanced –journey-level cashier series. It is distinguished from 4321 Cashier II by its supervisory and responsibility and ability to handle and account for large amounts of cash and negotiable instruments.

Supervision Exercised:

Supervises subordinates responsible for receiving, disbursing and accounting for large amounts of money.

Examples of Important and Essential Duties:

According to Civil Service commission Rule 9, the duties specified below are representative of the range of duties assigned to this job code, and are not intended to be an inclusive list.

1. Checks for counterfeit bills and audits deposit sheets.
2. Prepares daily cash balances and bank deposits.
3. Supervises the receipt of cash, checks, drafts and money orders.
4. Responsible for preparing, checking, and reviewing a variety of financial reports.
5. Plans, organizes and assigns functions to subordinates.
6. Reconciles cash, checks, and warrants.
7. May act as department cashier supervising the receipt, balancing and accounting for large amounts of money.
8. Responsible for explaining, carrying out and enforcing existing methods and procedures related to receipt and/or disbursement of funds.
9. Performs related duties and responsibilities as assigned.

Job Related and Essential Qualifications:

Knowledge of: Standard banking procedures involved in handling checks and related processes; checks, bonds and other common negotiable instruments and their proper endorsement; the method of balancing checks and cash against records of their receipts.

Ability to: Perform arithmetical computations; handle and account for large amounts of cash and negotiable instruments; communicate orally and in writing; solve problems; and supervise .

Experience and Training Guidelines:

1. Two years of experience as a Cashier of which one year must be supervising personnel who receive and/or disburse and account for large amounts of money;
- OR
2. Two years of experience as a Cashier plus one year of general supervisory experience.
3. Some positions require the ability to operate a 10-key adding machine (optional).

Special Requirements:

Essential duties require the following physical skills and work environment; ability to work in a standard office environment which may involve prolonged sitting, bending and operation of typing, word processing, calculating and other office equipment.

Effective Date: 4/30/93

Amended Date: 7/23/99

Reason for Amendment:

To accurately reflect the current tasks, knowledge, skills and abilities defined in the most recent job analysis conducted for this job code.

CLASS TITLE: PARKING METER COLLECTOR

CODE: 4324

CHARACTERISTICS OF THE CLASS:

Under general supervision, collects money from parking meters; sorts, counts and records collections; and performs related duties as required.

Requires responsibility for: following established methods and procedures in the collection and accounting of parking meter receipts; nature of work involves sustained physical effort involving heavy lifting and independent performance of duties involving the handling of uncounted money.

EXAMPLES OF DUTIES:

1. Collects money deposited in parking meters using hand truck and sealed money containers; notes and reports defective meters.
2. Drives truck to transport equipment and collections to and from assigned route.
3. Weighs money container and operates machine to sort and count coins.
4. Keeps records of daily collections; cleans and maintains money counting machine.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of high school, supplemented by two years of experience in handling money; or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Requires knowledge of street geography of the city.

Requires ability to: work independently in the handling of uncounted money; requires good physical condition and ability to lift heavy containers.

License: Requires possession of a valid state chauffeurs license.

PROMOTIVE LINES:

To: Parking Meter Collections Supervisor

From: Original entrance examination



(AMENDED)

Class Spec...

CLASS TITLE: PARKING METER COLLECTIONS SUPERVISOR

CODE: 4326

CHARACTERISTICS OF THE CLASS:

Under direction, supervises the field activities of a group of subordinates engaged in the collection of money from parking meters; and performs related duties as required.

Requires responsibility for: Carrying out, interpreting and enforcing existing policy and methods relating to the collection of parking meter revenue; insures that scheduled collections are made, and that security procedures are followed.

EXAMPLES OF DUTIES:

1. Schedules and assigns collection duties to a group of parking meter collectors issues route maps, carts and other equipment needed by crews.
2. Determines that collections are made in accordance with the schedule for each district; insures that good security precautions are followed.
3. Issues parking meter keys and collects each set of keys at the completion of the scheduled collection route.
4. Supervises the loading and unloading of coin containers; insures that the weighing of money containers and the sorting and counting of money received are carried out in accordance with standard procedures.
5. Informs supervisors of defective meters and coin counting machines or of theft from parking meters; requisitions supplies and equipment.
6. May perform the duties of parking meter collector when required.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of high school, supplemented by at least three years of experience in the collection of parking meter revenue; or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Requires considerable knowledge of: The practices and procedures involved in parking meter collections work; street geography of the City; supervisory techniques.

Requires ability and skill to: Assign and Supervise the work of subordinates engaged in the collection of parking meter money; maintain good security precautions in the handling of money.

PROMOTIVE LINES:

To : 4328 Chief, Parking Meter Collections

From: 4324 Parking Meter Collector

Amended: 12/3/73

DOCUMENTS

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SAN FRANCISCO CIVIL SERVICE COMMISSION

(NEW CLASS)

CLASS TITLE: CHIEF, PARKING METER COLLECTIONS

CODE: 4328

CHARACTERISTICS OF THE CLASS:

Under general direction, supervises and directs the work of a group of subordinates engaged in the collection of and accounting for money from parking meters; prepares and maintains records and accounts of money handled; performs related duties as required.

Requires responsibility for: Developing, coordinating and executing collection methods and procedures; achieving economies through the careful handling of large amounts of money; making responsible contacts with other departmental personnel relative to the collection and accounting of parking meter revenue; preparing and maintaining financial and statistical reports relating to collection activities.

EXAMPLES OF DUTIES:

1. Directs through subordinates the activities of parking meter collection crews; advises subordinates on appropriate collection procedures.
2. Prepares daily summary of all money collected and allocates revenue to appropriate accounts for deposit.
3. Directs the preparation of and prepares a variety of reports pertaining to parking meter collection activities.
4. Makes regular contacts with police and electric department representatives regarding defective meters and theft from meters.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of high school, supplemented by at least five years of experience in the collection of and accounting for parking meter money, including two years of supervisory experience; or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Requires comprehensive knowledge of: The methods and procedures involved in parking meter collections work; the preparation and maintenance of records and accounts of money handled.

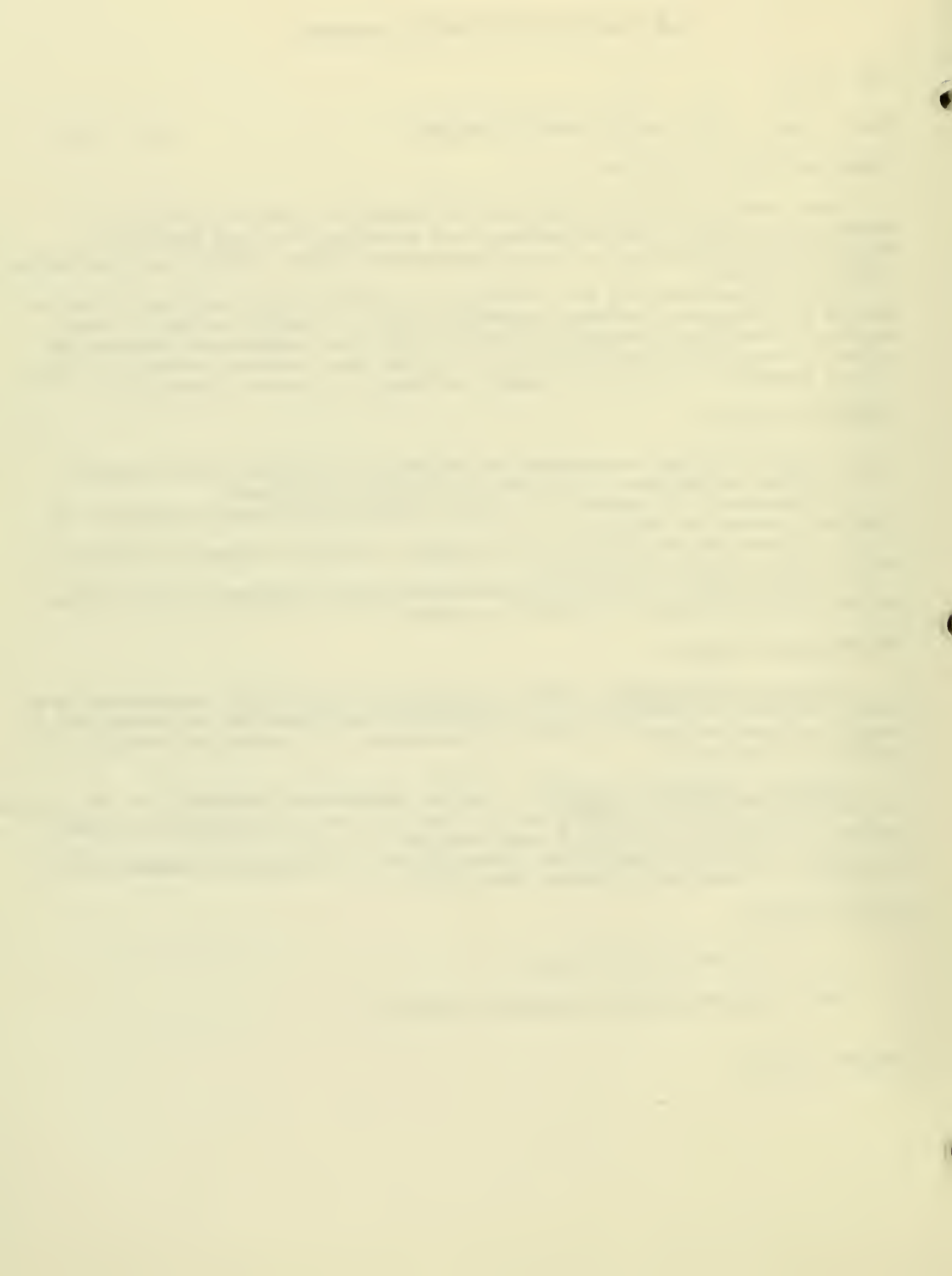
Requires ability and skill to: Direct the work of subordinates engaged in the collection and accounting of parking meter money.

PROMOTIVE LINES:

To : 4372 Cashier, Tax Collector

From: 4326 Parking Meter Collections Supervisor

Adopted: 12/3/73



CLASS TITLE: INVESTMENT SPECIALIST

CODE: 4330

CHARACTERISTICS OF THE CLASS:

Under general direction, administers the cash management program of the Treasurer or the Employees Retirement System; is responsible for continuous development and review of the City's investment policies in order to maximize interest income and to minimize the amount of noninterest bearing money; analyzes the money markets, processes contracts for deposit of funds and makes recommendations on investments and bank deposits; and performs related duties as required.

Requires considerable responsibility for: Originating and coordinating policies in the investment of large sums of money within the restrictions imposed by State Code, City Charter and Administrative Code; making frequent responsible contacts with bankers, brokers and others having a specialized knowledge in financial and investment activities; making investment recommendations based on constantly changing financial conditions.

EXAMPLES OF DUTIES:

1. Analyzes the fluctuation of money within the Treasurer's office or the Employees Retirement System; determines cash requirements and programs cash flow procedures and reporting systems.
2. Schedules purchase and repurchase agreements of Treasury and Federal bonds; estimates amounts of money which may be invested on a short-term basis.
3. Makes frequent contacts with money market houses for information regarding trends in investment activities.
4. Keeps daily balances of active and inactive accounts; maintains liaison with the Controller's office regarding special items of disbursements.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of a four-year college or university with a baccalaureate degree. Requires four years of progressively responsible experience in investment or financial management.

License: Requires possession of a current Security Agency Brokerage Sales license issued by the State of California.

Knowledge, Abilities and Skills: Requires a considerable knowledge of cash management and investment of funds; a thorough knowledge of cash flow in a large organization; a thorough knowledge of financial accounting and banking procedures; a working knowledge of the budgetary process of a chartered city, particularly in the area of the various departmental influences on cash flow and their relationship to the authority of the committees of the Board of Supervisors.

Requires considerable ability to: Exercise independent judgment in the handling of large sums of money; develop and maintain cash flow procedures and reporting systems; maintain good working relationships with money market house personnel.

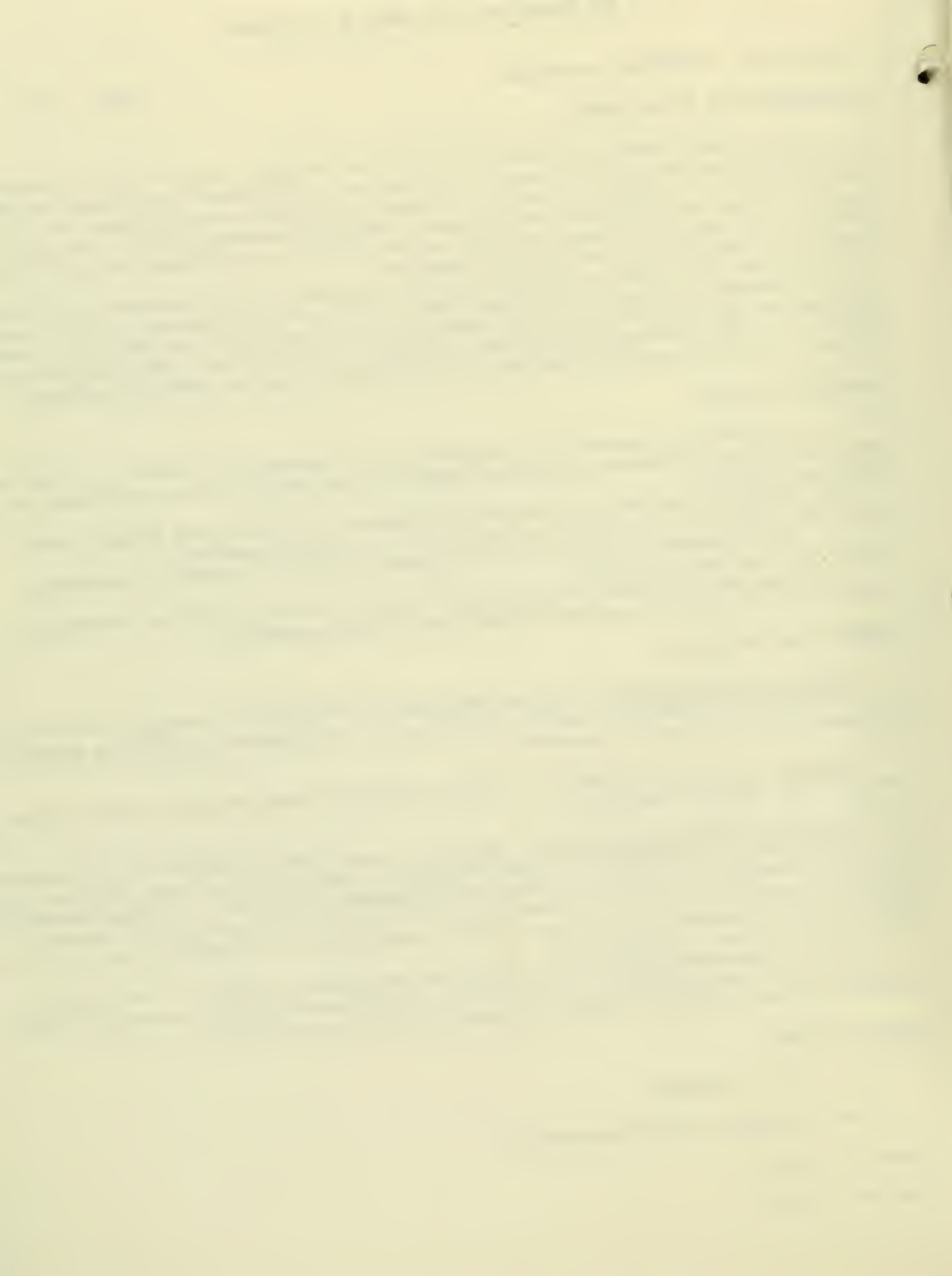
PROMOTIVE LINES:

To : To be determined

From: Original entrance examination

Adopted: 5/22/72

Amended: 8/18/75



SAN FRANCISCO CIVIL SERVICE COMMISSION

CLASS TITLE: SECURITY ANALYST

CODE: 4331

CHARACTERISTICS OF THE CLASS:

Under direction, analyzes economic conditions, industries and individual companies and conducts independent research to assure optimum investment opportunity for the portfolio consistent with Retirement Board policy; monitors performance of contract investment managers and submits reports and recommendations to superiors for action; and performs related duties as required.

DISTINGUISHING FEATURES:

Security Analysts provide technical support for Portfolio Managers and the Chief Investment Officer. Incumbents in this class perform difficult and complex research work involving knowledge of securities, investment and performance analysis.

EXAMPLES OF DUTIES:

"The class specifications shall be descriptive of the class and shall not be considered as a restriction on the assignment of duties not specifically listed." (CSC Rule 7)

1. Conducts research, analyzes primary source data and writes reports regarding the financial condition of an individual company's total business including product markets, financial condition, capital structure, earnings capacity, corporate strategy, investments and other relevant factors; calculates, evaluates and determines relative profitability and market or credit risk of individual company investments.

2. Reviews, evaluates and prepares reports on current financial strength of industries assigned on the basis of macro analysis, and constructs forecasts of the relative impact of expected economic developments on these industries; recommends possible investment candidates.

3. Measures performance of contract investment managers based on acceptable formula and submits written reports and recommendations to the Chief of Investments or Portfolio Manager as assigned.

4. Communicates verbally and in writing to superiors and the Retirement Board concerning investment action recommendations on companies and industries; indicates the portfolio implications of these recommendations in regard to determination of asset allocation.

5. Establishes contact with company representatives and outside consultants to secure financial data and evaluations on industries and companies reviewed.

6. Evaluates investment market values and recommends purchase and sale transactions to Portfolio Manager; upon approval executes security transactions on most advantageous terms.

7. Utilizes specialized investment software to access departmental data sources and analyze the information.

QUALIFICATIONS:

"The examination announcement shall provide the qualifications...and other particulars...Applicants must be guided solely by the announcement of the examination for which they apply." (CSC Rule 9)

Knowledge, Abilities and Skills: Knowledge of: all major industries, diversified securities and available markets; sources of data for analyzing securities; statistical and computer techniques applied to financial data in evaluating securities; investment performance measures; principles and methods of accounting and finance for business; stock, bond and real estate investment strategies and market evaluations and operations; laws, rules and regulations pertaining to the sale and purchase of securities; the practices utilized in investment transactions.

Ability to: analyze financial and security market data and situations and make sound recommendations based on such analysis; isolate critical investment data in evaluating securities; conduct performance evaluation of contract investment managers; negotiate purchase and sale of securities; prepare reports and make oral presentations; establish and maintain effective and harmonious working relationships with financial professionals and co-workers; qualify for a fidelity bond.

AMENDED: 10/2/89

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SAN FRANCISCO CIVIL SERVICE COMMISSION

CLASS TITLE: PORTFOLIO MANAGER

CODE: 4332

CHARACTERISTICS OF THE CLASS:

Under general direction, has major responsibility for assisting the Chief Investment Officer in the investment of pension funds; manages large portfolios of equities, fixed income, or alternative investments; and performs related duties as required.

DISTINGUISHING FEATURES:

Positions in this class report to the Chief Investment Officer of the San Francisco Employees Retirement System and are assigned to manage and invest a portion of the portfolio in a particular asset category such as equities, fixed income, real estate, venture capital or other alternative investments. Incumbents in the Portfolio Manager classification supervise Security Analysts who perform investment research work and provide technical support.

EXAMPLES OF DUTIES:

"The class specification shall be descriptive of the class and shall not be considered as a restriction on the assignment of duties not specifically listed." (CSC Rule 7)

ALL PORTFOLIO MANAGERS

1. Accumulates and organizes research information and data on assigned investment area; prepares and presents written and oral reports on assigned investment activities to the Chief Investment Officer and the Board.
2. Executes security transactions on most advantageous terms; maintains appropriate brokerage and dealer relationships; monitors transaction settlements for timeliness and accuracy.
3. Directs the activities of assigned security analyst; delegates research, data assembly, and other activities to security analyst as appropriate.
4. Represents investment area on Staff Investment Committee; provides input and expertise in developing the Department's investment strategy.
5. Directs searches for and recommends new external managers; evaluates performance of and makes recommendations regarding retention of external managers.

EQUITIES MANAGER

6. Manages internal equity portfolios in accordance with Department strategy; reviews and analyzes equity markets and recommends investment strategy.
7. Reviews and analyzes individual securities, makes investment decisions and executes security transactions for internal equity and other assigned portfolios.
8. Monitors the external equity managers, both domestic and international; reviews transactions for adherence to style and restrictions; analyzes performance individually and in the aggregate.

FIXED INCOME MANAGER

9. Manages fixed income portfolios in accordance with Department strategy; reviews and analyzes fixed income markets and recommends investment strategy.

10. Reviews and analyzes individual securities, makes investment decisions and executes security transactions for internal fixed income and other assigned portfolios.

11. Monitors the external fixed income managers, both domestic and international; reviews transactions for adherence to style and restrictions; analyzes performance individually and in the aggregate.

ALTERNATIVE INVESTMENTS MANAGER

12. Oversees the management of the real estate, venture capital, and other alternative investments of the portfolio.

13. Reviews and analyzes the appropriate markets and investment vehicles; works with consultants and managers to consider options and brings appropriate matters to the Retirement Board.

14. Monitors the external alternative investment equity and/or international equity and fixed income external managers; reviews transactions and consultant reports; analyzes performance individually and in the aggregate.

QUALIFICATIONS:

"The examination announcement shall provide the qualifications...and other particulars...Applicants must be guided solely by the announcement of the examination for which they apply." (CSC Rule 9)

Knowledge, Abilities, and Skills: Knowledge of: methods of investment market analysis and evaluation including modern portfolio theory and other systems of investment portfolio management; all major industries, diversified securities and available markets; investment practices and procedures especially regarding types of government and corporate securities, security market trends, and sources of data for analyzing securities; laws, rules and regulations pertaining to the purchase and sale of securities; the practices utilized in investments transactions; office practices and procedures; principles, procedures and methods of supervision.

Considerable ability to: analyze financial and security market data and situations, and to make prompt and sound decisions based on such analysis; isolate critical investment data in evaluating securities; negotiate purchase and sale of securities; establish and maintain effective and harmonious working relationships with financial professionals, co-workers, and the general public; prepare efficient and effective reports and detailed correspondence; deal effectively with and direct the work of others; qualify for a fidelity bond.

AMENDED & RETITLED: 10/2/89

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(AMENDED)

SAN FRANCISCO CIVIL SERVICE COMMISSION

CLASS TITLE: INVESTIGATOR, TAX COLLECTOR

CODE: 4334

CHARACTERISTICS OF THE CLASS:

Under general supervision, performs field investigations for the collection of delinquent revenues and enforcement of license, permit, and business tax ordinances; serves legal documents for court actions; and performs related duties as required.

Requires responsibility for: Carrying out, interpreting and enforcing existing policies and methods of the Tax Collector's Office; daily field contacts with merchants, business officials and defaulters; compiling accurate field reports.

EXAMPLES OF DUTIES:

1. Visits business establishments and private homes and contacts employers or individuals to collect money owing to the City and County; interviews defaulters to explain their legal obligation, the possibility of legal and fiscal penalties, and to obtain additional information; arranges installment payments with the debtor, when permitted, and recommends legal action when it is deemed necessary.

2. Conducts investigations to obtain and verify employment and earnings, credit reports, and information regarding real and personal property and other assets to determine defaulter's ability to pay.

3. Assists the department's attorney in preparing court cases by compiling reports of investigations; serves summonses, subpoenas, orders of examination, orders to show cause, or complaints and motions for modification to obtain levies against salary and property to bring defaulter before the court or to modify court orders.

4. Makes personal inspection of stores and other business establishments to check that licenses are current and valid; computes penalties and collects prescribed fees.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of high school, supplemented by two years of responsible credit or collection experience; or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Requires good knowledge of: Modern methods and practices used in collection investigations; geographical areas in the City.

Requires ability to: Exercise unusually good judgment in evaluating situations and making decisions; learn pertinent laws, ordinances, rules and regulations; deal firmly and courteously with the general public; communicate verbally and orally in a clear and concise manner.

Requires skill in the application of modern investigative methods and techniques to collection work.

PROMOTIVE LINES:

To : 4335 Senior Investigator, Tax Collector

From: 4346 Delinquent Revenue Assistant Supervisor

AMENDED: 10/15/71

**CITY AND COUNTY OF SAN FRANCISCO
DEPARTMENT OF HUMAN RESOURCES**

**JOB CODE TITLE: SENIOR INVESTIGATOR,
TAX COLLECTOR**

**JOB CODE: 4335
Business Unit: COMM**

Definition:

Under the direction of the Assistant Director, Bureau of Delinquent Revenue, supervises, trains and evaluates subordinates in the collection and investigation of delinquent accounts and enforcement duties for the Treasurer & Tax Collector's office; and performs related work as required.

Distinguishing Features:

This is the journey level in the Investigator series. It is distinguished from the 4334 Investigator by its supervisory duties and responsibility for performing more difficult and complex investigative work.

Supervision Exercised:

Supervises the 4334 Investigator.

Examples of Important and Essential Duties:

According to Civil Service commission Rule 9, the duties specified below are representative of the range of duties assigned to this job code and are not intended to be an inclusive list.

1. Supervises investigators, evaluates and monitors field/ in-house collection/investigation activities by reviewing reports and records of investigators' activities to ensure that collection goals are met and correct procedures are followed; and helps oversee collection units.
2. Trains new investigators in the field/in-house collection/investigation unit by instructing them on the relevant tax ordinances, license codes, procedures and forms currently in use. Provides instructions on field activities, surveys, procedures; safety measures; SCC post judgment, small claims court, lien, seizure, citation and other enforcement activities.
3. Enforces collection of delinquent taxes or debts by assignment to either small claims court, liens, citations, seizures, summary judgment or other enforcement remedy procedures to ensure payment of back-taxes and other debts owed the City.
4. Compiles collection/investigation reports and records on individuals and businesses delinquent in their obligations by reviewing investigators' reports, researching tax files and records for the department's attorney and to provide materials and information for cases against delinquent taxpayer
5. Develops and implements projects relating to various sources to find unregistered businesses; compiles list and assigns follow-up for business tax registration review.
6. Monitors the service of legal documents, such as subpoenas and summons through the mail or in person in conformity with federal, state and city regulations to ensure safe, reliable and correct methods of service. Also appears as expert witness for the City & County of San Francisco.
6. Negotiates payment plans with debtors, attorneys or agents; exercises sound judgement and discretion in compromising accounts; documents files for audit purposes; researches all available databases for compilation of obligations and for skip tracing purposes.

DOCUMENTS DEPT.

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**JOB CODE TITLE: SENIOR INVESTIGATOR,
TAX COLLECTOR**

**JOB CODE: 4335
Business Unit: COMMN**

Job Related and Essential Qualifications:

Knowledge of: Codes & ordinances, investigation techniques; modern methods, policies and procedures used in collection/investigations; and escrow, bankruptcy, small claims, bounced-check procedures and post-judgment creditor remedies.

Ability to: Assign, supervise, and review work of subordinate investigators; interpret pertinent laws, ordinances, rules, and regulations; communicate and exercise sound judgment in evaluating situations with tact, firmness, and courtesy in dealing with debtors; analyze and prepare clear, concise, and accurate reports; and navigate the computer.

Experience and Training Guidelines:

1. Possession of a Bachelor's Degree from an accredited college or university in Accounting, Management, Business Administration, Public Administration, or a related field;
AND
2. Two (2) years full -time delinquent collection experience, which must have included the gathering, tracing and locating of information concerning an individual's ability to pay. One year of the requisite experience must have been in field collection/investigative activities.
AND
3. Possession of a valid Driver's License (a copy is required at the time of appointment);

SUBSTITUTION:

Additional verified work experience in field collection/investigation (as listed under minimum qualification #2) may be substituted for required education on a year-for-year basis; one year of additional experience is equivalent to 30 semester or 45 quarter units.

Effective Date: 10/15/71

Amended Date: 9/22/00

Reason for Amendment:

To accurately reflect the current tasks, knowledge, skills and abilities defined in the most recent job analysis conducted for this job code.

CLASS TITLE: LICENSE BUREAU ASSISTANT SUPERVISOR

CODE: 4336

CHARACTERISTICS OF THE CLASS:

Under direction, assists in supervising the issuing of business, occupational and other licenses required by the city; and performs related duties as required.

Requires responsibility for: interpreting, enforcing and carrying out methods and procedures relating to the processing and issuance of licenses; making regular contacts with other departmental personnel and the general public in connection with issuing licenses; preparing and reviewing important operational records and reports.

EXAMPLES OF DUTIES:

1. Assists in supervising subordinate clerical personnel engaged in the issuing of occupational, business, professional and other licenses and the collection of related fees.

2. Pro-rates license fees according to applicable ordinances; computes amount of fees for special licenses.

3. Provides information on inquiries concerning permit, licenses and fees; receives and distributes permits for processing.

4. Prepares and supervises the preparation of periodic records and reports concerning office operations.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of high school. supplemented by at least four years of progressively responsible clerical experience in the issuance of city licenses and permits; or an equivalent combination of training and experience.

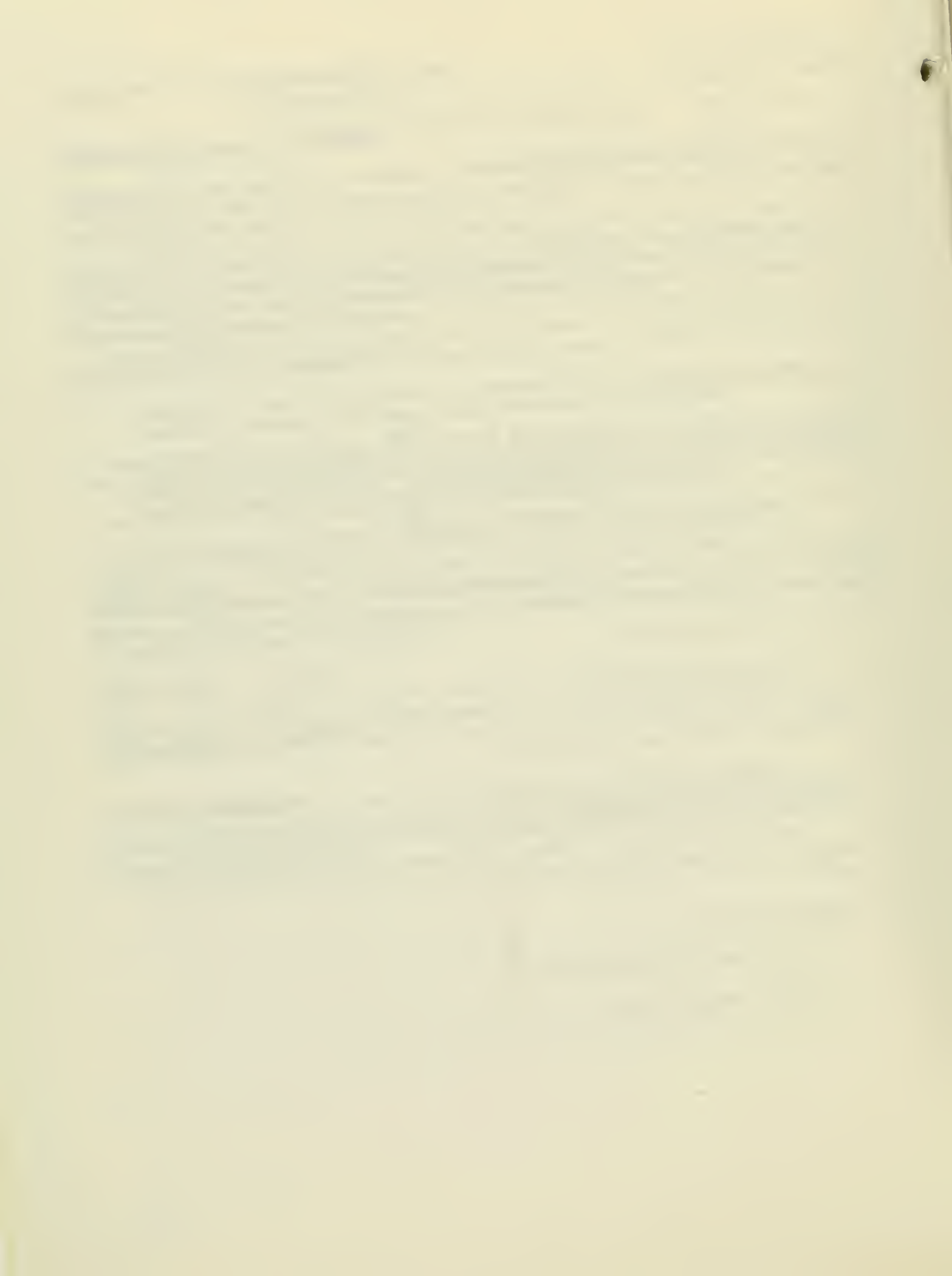
Knowledge, Abilities and Skills: Requires good knowledge of: the laws, methods and procedures pertaining to the issuance of permits and licenses; modern office practices.

Requires ability to: assign and supervise the activities of subordinate personnel; deal effectively and courteously with the general public.

PROMOTIVE LINES:

To: License Bureau Supervisor

From: Senior Clerk



**CITY AND COUNTY OF SAN FRANCISCO
DEPARTMENT OF HUMAN RESOURCES**

**JOB CODE TITLE: PRINCIPAL INVESTIGATOR,
TAX COLLECTOR**

**JOB CODE: 4337
Business Unit: COMMN**

Definition:

Under direction of the Deputy Tax Administrator or designee, this position administers the Third Party regulations by assigning, supervising, and reviewing the performance of field surveys and staff (investigators and auditors) in the collection and investigation of delinquent accounts and enforcing local, state and federal laws and regulations.

Distinguishing Features:

This is the highest level in the Investigator series. It is distinguished from the 4335 Senior investigator by its supervisory duties and responsibility for performing more difficult and complex investigative work.

Supervision Exercised:

Supervises the 4334 Investigator and 4335 Senior Investigator, Tax Collector.

Examples of Important and Essential Duties:

According to Civil Service commission Rule 9, the duties specified below are representative of the range of duties assigned to this job code and are not intended to be an inclusive list.

1. Responds to complaints received regarding parking operations; conducts field investigations to establish need for field audits of Third Party Taxpayers, and issues citations for violations of the Municipal Code as required.
2. Surveys procedures of other jurisdictions to ensure the City maintains the highest standards practiced in Third Party Tax compliance for municipal jurisdictions.
3. Reports status of field assignments and special projects to Deputy Tax Administrator, and informs the Chief Auditor of Business Taxes or other related sections as directed.
4. Works closely with Legal Section to expedite collection of delinquent parking taxes; assists the attorney in the preparation and prosecution of cases by reviewing the accounts for document completeness prior to final litigation; and represents the City and County as a witness.
5. Testifies in court on status of field surveillance or investigations conducted to establish parking or other Third Party tax liability violations.
6. Gathers relevant information from taxpayer, public, and private associations regarding the debtor's location, assets, and liabilities, and utilizes other current skiptracing techniques.
7. Interprets complex ordinances, state codes, and federal laws to explain obligation to the taxpayer.
8. Reviews, prepares, and maintains field investigation records and reports on status of accounts.
9. Supervises field surveys for unregistered businesses, parking garages, and lots; re-evaluates businesses for proper classification or exemption.

Job Related and Essential Qualifications:

Knowledge of: Revenue and Taxation Code, Business Tax Ordinance, enforcement of Judgments Act and permit ordinances; modern methods, policies, procedures used in collection/investigations; and escrow, bankruptcy, small claims, bounced-check procedures and post-judgment creditor remedies.

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**JOB CODE TITLE: PRINCIPAL INVESTIGATOR,
TAX COLLECTOR**

**JOB CODE: 4337
Business Unit: COMM**

Ability to: Assign, supervise, and review work of subordinate investigators; interpret pertinent laws, ordinances, rules, and regulations; communicate and exercise sound judgment in evaluating situations with tact, firmness, and courtesy in dealing with debtors; and analyze and prepare clear, concise, and accurate reports.

Experience and Training Guidelines:

1. Possession of a Bachelor's Degree from an accredited college or university;
AND
2. Possession of a valid Driver's License;
AND
- 3a. Two years of verified professional work experience as the manager, supervisor, or senior investigator of a governmental field tax collection and investigation unit involved in the collection and investigation of delinquent tax obligations. This experience must include supervising lower-level field tax collection/investigation staff and/or directing, developing and implementing programs and policies relevant to the collection/investigation of delinquent tax obligations;
OR
- 3b. Five years of verified professional work experience as an investigator of a governmental field tax collection/investigation unit involved in the collection and investigation of delinquent tax obligations.

SUBSTITUTION:

Additional verified experience as a professional investigator (as listed under minimum qualification #3a or #3b) may be substituted for required education on a year-for-year basis—one year of experience is equivalent to 30 semester or 45 quarter units.

Effective Date: 2/24/69

Amended Date: 4/28/00

Reason for Amendment:

To accurately reflect the current tasks, knowledge, skills and abilities defined in the most recent job analysis conducted for this job code.

SAN FRANCISCO CIVIL SERVICE COMMISSION

(AMENDED)

CLASS TITLE: LICENSE BUREAU SUPERVISOR

CODE: 4338

CHARACTERISTICS OF THE CLASS:

Under general direction, supervises the work of a bureau of the Tax Collector's office engaged in the issuance of business, occupational and other licenses and in the collection of business and hotel transient occupancy taxes; assists in the preparation or revision of license and permit ordinances; and performs related duties as required.

Requires responsibility for: Carrying out, developing, interpreting, coordinating and enforcing the policies and methods of the license bureau; achieving considerable economies through the proper enforcement of license and permit ordinances; periodic conferences and contacts with City officials in reference to license problems; requires over-all supervisory responsibility for important operational and financial records.

EXAMPLES OF DUTIES:

1. Assigns, supervises and reviews the work of a clerical staff engaged in the collection of fees for occupation, business, professional and other City licenses and the collection of business and hotel transient occupancy taxes; supervises the issuance of all licenses and permits.
2. Confers with representatives of the City Attorney's office, Board of Permit Appeals, Controller and other departments regarding license problems; prepares special reports on bureau activities for legislative study; reviews and comments on new license and permit ordinances before they are presented for adoption.
3. Interprets license and permit laws and procedures to public and employees.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of high school supplemented by five years of increasingly responsible experience in the issuance of business licenses for a public agency, including two years of supervisory experience; or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Requires considerable knowledge of: The principles, practices and pertinent laws involved in the issuance of licenses and permits; taxation laws relating to business and hotel transient occupancy taxes; modern techniques and practices used in office administration; the various types of business establishments within the county.

Requires ability to: Assign, supervise and review the work of subordinate clerical employees; analyze and interpret existing and proposed legislation dealing with the licensing of commercial establishments and other enterprises; prepare clear and concise reports.

PROMOTIVE LINES:

To : 1133 Tax Collector or Registrar of Voters
From: 4336 License Bureau Assistant Supervisor
1410 Chief Clerk
1634 Principal Account Clerk

AMENDED: March 24, 1969

**CITY AND COUNTY OF SAN FRANCISCO
DEPARTMENT OF HUMAN RESOURCES**

CLASS TITLE: ASSISTANT DIRECTOR, BUREAU OF DELINQUENT REVENUE **CODE:** 4340

DEFINITION

Under general direction, the incumbent acts as the chief assistant to the Director, Bureau of Delinquent Revenue in the Treasurer/Tax Collector's Office; supervises an investigations/specialized collection unit of the Bureau; administers the activities related to the enforcement of the City & County taxes and/or revenue collection; acts as the Director, Bureau of Delinquent Revenue in his or her absence; and performs other related duties as required.

DISTINGUISHING FEATURES:

The incumbent in this class assists in the program management of the Bureau of Delinquent Revenue, the entity responsible for collecting the majority of collection enforcement and other fiscal management services for charges due or owing for City and County services citywide. This class will direct, assign and manage delinquent accounts receivables activity and assist top management in developing, reviewing, and monitoring collections and investigative procedures, programs and systems; and train subordinate staff in such matters as collection techniques and regulations. This class is distinguished from Collection Supervisor in that the latter supervises a collection unit in one department.

SUPERVISION EXERCISED: Supervises 4366 Collections Supervisors, 4335 Senior Investigators and Clerical Staff.

EXAMPLE OF IMPORTANT AND ESSENTIAL DUTIES:

According to Civil Service Commission Rule 9, the duties specified below are representative of the range of duties assigned to this class and are not intended to be an inclusive list.

1. Plans, assigns, supervises and inspects the work of subordinate personnel to assure conformance with the Bureau of Delinquent Revenue investigation and collection requirements, office methods and procedures and applicable laws and regulations.
2. Manages delinquent accounts receivable files; coordinates collection, related fiscal management services and reporting activities with other agencies; resolves credit disputes and problems with other entities; directs the selection and assignment of personnel; handles performance issues and participates in management-employee relations.
3. Coordinates or performs the work on the most difficult collection and on investigations accounts/cases which will involve the exercise of individual expert judgment of section procedures; negotiates and resolves complex collection cases; works closely with legal staff to resolve pending collection accounts subject to litigation.
4. Assists senior management in the development, review and monitoring of collections and investigative procedures and programs; researches, reviews and recommends procedures to implement collection processes in terms of new ordinances and regulations; assists in developing, enhancing and analyzing automated management information systems.
5. Trains Bureau of Delinquent Revenue staff in collection/investigative techniques and regulations, including skip tracing; manages and enhances the Bureau's computerized collection system and property tax systems; trains other users and generates any related correspondence to Bureau's activities.

6. Represents the City in public and official contacts, conferences, meetings and as a witness in any legal actions including Small Claims Court; assists the staff of departmental legal counsel and the City Attorney's Office with case preparation before filing liens; acts as administrative hearing officer in property seizures disputes.
7. Supervises and participates in the preparation and maintains a wide variety of memos, correspondence, and other documents including complicated statistical reports and records.
8. Performs related duties and responsibilities as assigned.

JOB RELATED AND ESSENTIAL QUALIFICATIONS

Knowledge of: applicable laws, regulations and procedures such as the Revenue and Taxation Code, Business Tax Ordinance, and Bankruptcy Code related to management of municipal collections and investigations; automated collection systems.

Ability to: research, interpret and apply legal and administrative procedures and policies; prepare comprehensive, clear and concise correspondence and reports; organize and perform detailed work; identify problems and recommend and coordinate solutions as necessary; establish and maintain cooperative working relationships; analyze and research data to reach a decision to make a recommendation; speak clearly, concisely and effectively to individuals and/or groups; operate a personal computer to utilize specialized computerized systems/software; supervise and manage personnel.

Experience and Training Guidelines:

Any equivalent combination of training and experience that would provide the required knowledge, skills and abilities would be qualifying. A typical way to obtain the knowledge, skills and abilities would be:

Training:

Equivalent to the possession of an associate arts degree.

Experience:

Requires three years experience at a supervisory level in collections and/or investigations.

License:

Possession of a valid California Driver's License

Special Requirements:

Essential duties require the following physical skills and work environment:

To work in a standard office environment

Effective: 9/11/72

Retitled and Amended: 4/28/99

Reason for amendment:

Class 4340 has been retitled and amended to reflect the broader responsibilities of the position and resulting from a departmental reorganization.

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SAN FRANCISCO CIVIL SERVICE COMMISSION

CLASS TITLE: DELINQUENT REVENUE ASSISTANT SUPERVISOR

CODE: 4346

CHARACTERISTICS OF THE CLASS:

Under direction, performs highly responsible and specialized duties in the collection of delinquent accounts receivable; acts for the bureau supervisor in his absence; and performs related duties as required.

Requires responsibility for: carrying out, interpreting, and enforcing policies, regulations and procedures governing the collection of delinquent revenues and assisting in the development of new intra-unit methods and procedures; achieving moderate economies through the recovery of delinquent accounts receivable owed to the city government; frequent contacts with irate or uncooperative individuals on delinquent account matters; checking, preparing and reviewing important operational and financial records.

EXAMPLES OF DUTIES:

1. Follows up on all probate cases in which the bureau has filed a claim for money owed the various city institutions, or property damage claims for one of the other departments of the city and county; reviews notices of inheritance tax appraisals, inventories and other claims filed on estates.

2. Follows the progress of personal injury cases which concern the operations of the bureau; records the various stages of law suits, such as pre-trial taking of depositions, actual trial or compromise; contacts attorneys and requests their cooperation in the payment of bills when a recovery has been made.

3. Maintains a running account of all information received, letters written, phone conversations or personal interviews made, relative to particular accounts.

4. Confers with supervisor and the department attorney as to the advisability to take legal action against various delinquent accounts; recommends to supervisor compromises of claims, or a redetermination of charges.

5. Processes payments of personal property taxes and records any adjustments or agreements reached; confers with the assessor's office regarding erroneous assessments, duplicate assessments, or other problems that may arise in connection with the collection of accounts.

6. Receives, screens and distributes mail to office staff; instructs subordinate personnel in the processing of delinquent accounts and personally handles the more difficult cases; acts for bureau supervisor in his absence and assigns, supervises and reviews all the activities involved in the collection of delinquent accounts receivable.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of high school, supplemented by at least six years of increasingly responsible experience in the collection of delinquent accounts receivable; or an equivalent combination of training and experience.

CLASS TITLE: DELINQUENT REVENUE ASSISTANT SUPERVISOR
(continued)

CODE: 4346

Knowledge, Abilities and Skills: Requires considerable knowledge of: the principles and practices involved in the collection of delinquent accounts, policies, regulations and procedures governing delinquent revenue collections; modern office methods and procedures.

Requires ability to: establish and maintain effective working relations with other city personnel, attorneys and the general public; exercise unusually good judgment in evaluating situations; direct and review the work of subordinates.

PROMOTIVE LINES:

To: Delinquent Revenue Supervisor

From: Senior Collection Clerk
Senior Clerk
Investigator, Tax Collector

SAN FRANCISCO CIVIL SERVICE COMMISSION

(AMENDED)

CLASS TITLE: DELINQUENT REVENUE SUPERVISOR

CODE 4348

CHARACTERISTICS OF THE CLASS:

Under general direction, supervises the work of a bureau of the Tax Collector's office engaged in the collection of delinquent accounts receivable for departments of the City government; and performs related duties as required, including taxes on real estate, personal property, licenses, and business and hotel transient occupancy taxes.

Requires responsibility for: Carrying out, developing, interpreting, coordinating and enforcing the policies and methods of the bureau of delinquent revenue; achieving considerable economies through the recovery of delinquent accounts receivable owed to the City government; frequent contacts with irate or uncooperative individuals; requires over-all supervisory responsibility for the maintenance of important operational and financial records.

EXAMPLES OF DUTIES:

1. Assigns, supervises and reviews the work of field and office employees engaged in the collection of delinquent accounts receivable transferred from other City departments or bureaus for further action.
2. Recommends to various department heads compromise on certain claims with approval of the Controller.
3. Recommends redeterminations of various accounts when no money or only part of what is due can be collected.
4. Communicates with attorneys by correspondence, in person or by telephone regarding possible compromise and settlement in pending damage suits, hospital bills, or estates in probate.
5. Recommends cases to be referred to department attorneys for litigation.
6. Signs all claims in probate and compensation claims.
7. Supervises the collection of unsecured property taxes before and after delinquency; corresponds with attorneys, debtors and taxpayers regarding claims on unsecured property rolls.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of high school, supplemented by eight years of increasingly responsible experience in the collection of delinquent accounts receivable, including two years of supervisory experience; or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Requires considerable knowledge of: The principles and practices involved in the collection of delinquent accounts receivable; modern office methods and procedures.

Requires ability to: Exercise unusually good judgment in evaluating situations and making decisions; assign, supervise and review the work of subordinates; establish and maintain effective working relationships with City department heads, attorneys and the general public.

PROMOTIVE LINES:

To : 1133 Tax Collector or Registrar of Voters

From: 4346 Delinquent Revenue Assistant Supervisor
1634 Principal Account Clerk
4335 Senior Investigator, Tax Collector

AMENDED: March 24, 1969



JUN 30 2000

**CITY AND COUNTY OF SAN FRANCISCO
DEPARTMENT OF HUMAN RESOURCES**SAN FRANCISCO
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TAX COLLECTOR'S OFFICE****JOB CODE: 4349
Business Unit: COMMN****Definition:**

Under the direction of the Deputy Tax Administrator, this position supervises the Tax Payer's Assistance Section.

Distinguishing Features:

This is a single-position class in the Tax Collector's office. It is distinguished from the 4366 Collections Supervisor by its supervisory duties and responsibility in that the former supervises the Taxpayer's Assistance Section and performs more difficult and complex work than the 4366 Collections Supervisor.

Supervision Exercised:

Supervises subordinate staff.

Examples of Important and Essential Duties:

According to Civil Service commission Rule 9, the duties specified below are representative of the range of duties assigned to this job code (class) and are not intended to be an inclusive list.

1. Supervises and coordinates activities of the Taxpayer's Assistance Section, Business Tax Unit, and all other tax-related issues.
2. Manages subordinate employees responsible for providing tax information and responding to inquiries regarding tax debts and tax preparation.
3. Interprets and clarifies state and local laws, rules, regulations and ordinances of the County and State Controllers office to the public on matters pertaining to the collection of various taxes.
4. Oversees the Business Tax Unit's review of applications for refunds and waivers in registering new businesses.
5. Directs inquiries to proper channels regarding cancellation of penalties on accounts as provided for in the California Revenue and Taxation Code and Business Tax local ordinances.
6. Prepares reports and maintains the unit's statistical data regarding tax-related complaints, walk-in inquiries, and incoming phone calls.
7. Delivers recommendations to management regarding improvements to ensure that office operations adhere to customer service standards.
8. Represents the City's Tax Office department by presenting and receiving information regarding tax issues from community forums, business fairs, conferences, and other similar public functions.

Job Related and Essential Qualifications:

Knowledge of: relevant state and local rules, regulations, laws and ordinances involving taxes and revenues; principles, practices and procedures related to administration and collection of various taxes.

**JOB CODE TITLE: DIRECTOR OF REAL ESTATE,
TAX COLLECTOR'S OFFICE**

**JOB CODE: 4349
Business Unit: COMMN**

Ability to: identify organizational problems and implement solutions; establish goals and objectives; plan, direct and administer activities of a program; monitor progress of activities and evaluate outcome of projected goals and objectives; evaluate situations and take appropriate course of action in solving problems.

Experience and Training Guidelines:

1. Possession of a Bachelor's Degree from an accredited college or university with major coursework in accounting, finance, business administration, public administration or a related field; **AND** Two years of verifiable supervisory experience in an agency involving the supervision of a complex and diversified staff or operation that provides municipal or state tax information;

OR

2. Two years coursework (60 semester units or 90 quarter units) from an accredited college or university with major coursework in accounting, finance, business administration, public administration or a related field; **AND** Four years of verifiable supervisory experience in an agency involving the supervision of a complex and diversified staff or operation that provides municipal or state tax information.

Effective Date: 6/16/75

Renewed/Amended Date: 5/26/00

Reason for Amendment:

To accurately reflect the current tasks, knowledge, skills and abilities defined in the most recent job analysis conducted for this job code.

SAN FRANCISCO CIVIL SERVICE COMMISSION

CLASS TITLE: CASHIER, SHERIFF

CODE: 4352

CHARACTERISTICS OF THE CLASS:

Under direction, is responsible for the collection and disbursement of large sums of money in the sheriff's office; prepares and maintains records and accounts of money handled; and performs related duties as required.

Requires responsibility for: explaining and carrying out existing methods and procedures in connection with the handling of moneys and attached properties; preventing considerable losses through the careful handling of large amounts of money; making regular contacts with other departmental personnel, the general public and legal representatives relative to the handling of funds and properties; preparing and maintaining financial records and reports of moneys collected and disbursed.

EXAMPLES OF DUTIES:

1. Collects, receipts for and deposits all monies and checks received from a wide variety of sources.
2. Prepares daily balance sheets of all moneys to be deposited with the treasurer.
3. Receives and deposits money in the sheriff's trust fund and superior and municipal court funds.
4. Disburses moneys from the Sheriff's trust fund under attachment, execution, stipulation and court orders.
5. Disburses notary fees, petty cash and transportation allowances and maintains appropriate accounting records of such disbursements.
6. Is responsible for the custody of bonds, undertakings and other collateral deposited in connection with sheriff's actions.
7. Is responsible for the safe keeping of seized or attached properties including furs and ownership certificates of automobiles.
8. Provides information to legal representatives and the general public in connection with sheriff's office procedures.
9. Signs releases for real and personal property under levy of attachment.
10. Calculates and determines amounts of bonds, undertaking or cash deposits required to release or prevent attachment of property.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of high school, supplemented by at least four years of progressively responsible experience in the receipt and disbursement of large sums of money, preferably including some supervisory experience; or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Requires considerable knowledge of: the methods and procedures of handling and accounting for large sums of money; the laws and regulations applicable to the collection and disbursement of city funds, particularly as they apply to the sheriff's office.

Requires ability to: make arithmetical calculations with speed and accuracy; deal effectively and courteously with the general public; detect counterfeit moneys and bad checks.

PROMOTIVE LINES:

To: Cashier, Tax Collector
Chief Deputy Sheriff (Civil)

From: Teller

CLASS TITLE: CASHIER, COUNTY CLERK

CODE: 4356

CHARACTERISTICS OF THE CLASS:

Under direction, is responsible for collecting large amounts of money for services rendered by the county clerk's office; maintains records and accounts of money received and disbursed; and performs related duties as required.

Requires responsibility for: explaining and carrying out existing methods and procedures in connection with the receipt and disbursement of funds; achieving considerable economies through the proper handling of large amounts of money; making routine contacts with the general public in connection with the receipt and disbursement of funds; gathering and preparing ordinary financial reports of money received and disbursed.

EXAMPLES OF DUTIES:

1. Collects fees for all documents filed and services rendered by the county clerk's office; reviews amounts charged for various services for correctness, and checks against payment for such services.

2. Prepares daily summary of all moneys collected and allocates to appropriate accounts for deposit.

3. Prepares deposit sheets, balances cash and deposits money and checks with the treasurer's office; maintains records of services rendered and fees charged.

4. Prepares warrants for monies to be paid out of special funds, including jury fees and deposits on court actions; prepares warrants for refunds of duplicate payments.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of high school, supplemented by at least four years of progressively responsible experience in the receipt and disbursement of large sums of money, preferably including some supervisory experience; or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Requires considerable knowledge of: the methods and procedures of handling and accounting for large sums of money; pertinent laws, codes and regulations applicable to the collection and disbursement of city funds, particularly those involving the county clerk's office.

Requires considerable ability to: make fast and accurate arithmetical calculations; deal effectively and courteously with the public; detect counterfeit money and bad checks.

PROMOTIVE LINES:

To: Assistant County Clerk

From: Cashier, Sheriff
Assistant Cashier, Tax Collector



CLASS TITLE: ASSISTANT CASHIER, WATER DEPARTMENT

CODE: 4360

CHARACTERISTICS OF THE CLASS:

Under general supervision, assists in supervising the receipt of large amounts of money in payment of water bills; personally performs responsible cashier work in connection therewith; and performs related duties as required.

Requires responsibility for: explaining and carrying out existing methods and procedures in connection with the collection and deposit of moneys in payment of water bills; achieving considerable economies through the careful and proper handling of large amounts of money; making routine contacts with other departmental personnel and the general public in connection with the collection and handling of payments; preparing and maintaining routine reports of moneys handled and deposited.

EXAMPLES OF DUTIES:

1. Checks moneys received by subordinate personnel against receipts and verifies amounts.
2. Makes microfilms of and endorses checks, money orders and related receipts and documents.
3. Arranges checks, drafts and money orders in appropriate sequences for deposit; prepares deposit slips and receipts for active unverified deposits.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of high school, supplemented by at least three years of progressively responsible experience in the receipt and accounting of large amounts of money, including one year of supervisory experience; or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Requires good knowledge of: the methods and procedures of handling and accounting for large amounts of money; appropriate laws and regulations applied to the collection and disbursement of city funds; the over-all operation of the department, particularly in respect to the collection of water bills.

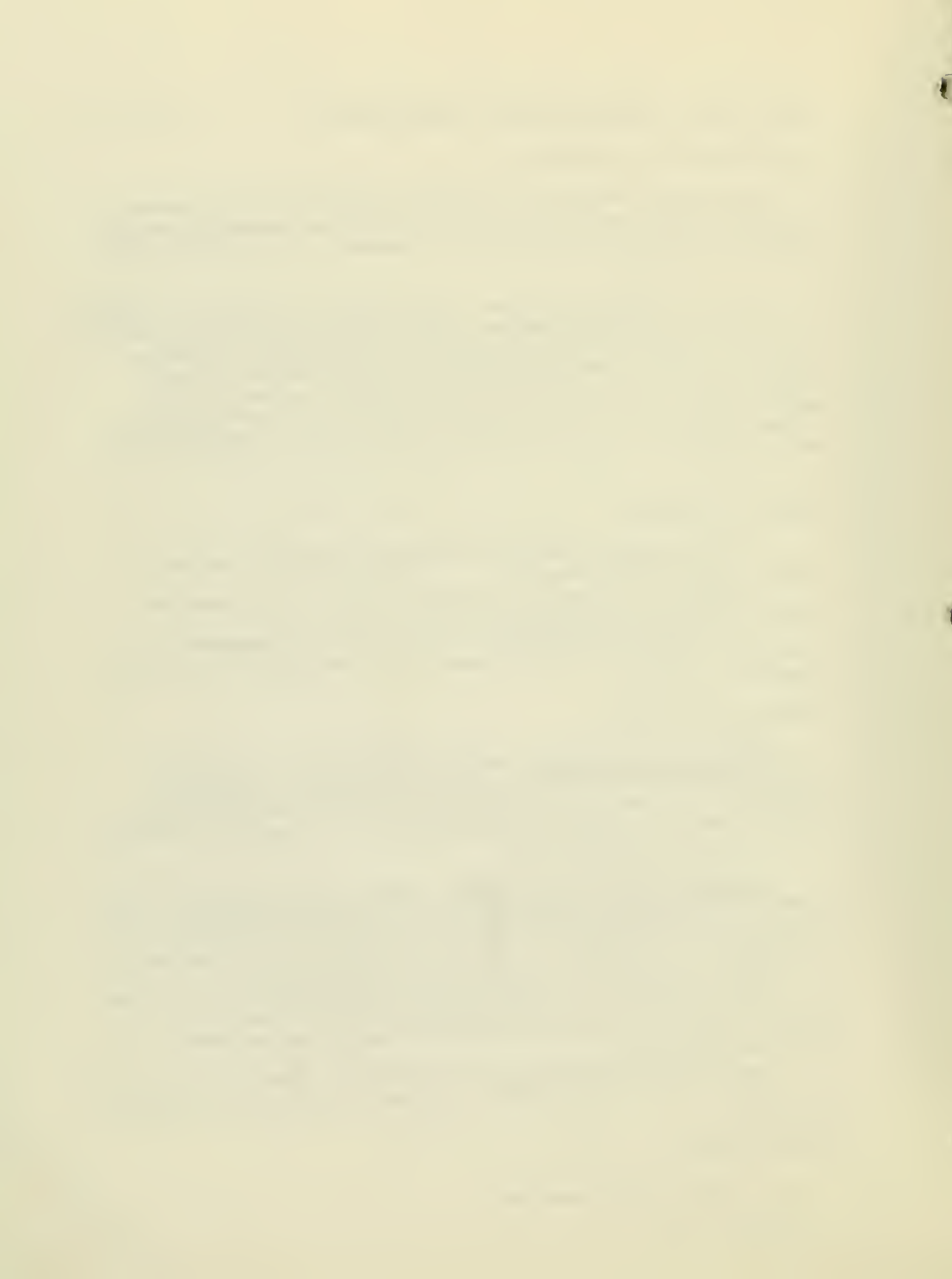
Requires ability to: perform arithmetical calculations with speed and accuracy; meet with and deal effectively and courteously with the public; detect counterfeit money and bad checks; requires some supervisory ability.

Requires considerable skill in the handling and accounting for large sums of money and sufficient skill in typing to complete 45 net words per minute.

PROMOTIVE LINES:

To: Cashier Water Department

From: Teller



SAN FRANCISCO CIVIL SERVICE COMMISSION

CLASS TITLE: CASHIER, WATER DEPARTMENT

CODE: 4362

CHARACTERISTICS OF THE CLASS:

Under direction, supervises the receipt of large amounts of money in payment of water bills; personally performs responsible cashier work in connection therewith; and performs related duties as required.

Requires responsibility for: interpreting, enforcing and carrying out existing methods and procedures in connection with the handling of funds; achieving considerable economies through the careful handling of large amounts of money; making regular contacts with other departmental personnel and the general public in connection with the payment of water bills and the handling of related funds; preparing, checking and reviewing detailed cash handling records and reports.

EXAMPLES OF DUTIES:

1. Receives checks, drafts and money orders from subordinate personnel: checks and balances moneys received.

2. Reviews and checks deposit slips and receipts for active and unverified deposits for accuracy and completeness.

3. Prepares bank deposits for pick up by bank messenger; assures sufficient supplies of change are on hand for the various tellers; makes up tellers banks.

4. Assures that tellers cages are adequately supplied with funds throughout the day's operation.

5. Checks suspected counterfeit money and negotiable instruments and follows up on proper handling of bad checks and counterfeit money.

6. Prepares and supervises the preparation of records and reports relative to the receipt and deposit of funds.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of high school, supplemented by at least five years of progressively responsible experience in handling and accounting for large sums of money, including two years of responsible supervisory experience; or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Requires considerable knowledge of: the methods and procedures used in handling and accounting for large sums of money; the laws and regulations applicable to the collection and disbursement of city funds; over-all departmental operations, particularly as they relate to the collection of water bills.

Requires ability to: make rapid and accurate arithmetical computations; detect counterfeit money and bad checks; plan, assign and supervise the work of subordinate personnel.

PROMOTIVE LINES:

To: Assistant Collection Supervisor, Water Department

From: Assistant Cashier, Water Department

CLASS TITLE: ASSISTANT COLLECTION SUPERVISOR,
WATER DEPARTMENT

CODE: 4364

CHARACTERISTICS OF THE CLASS:

Under direction, assists in supervising and directing the collection and accounting for of all monies received in payment of water services; and performs related duties as required.

Requires responsibility for: carrying out, interpreting and coordinating existing procedures in connection with the processing and collection of water bills; making regular contacts with other departmental personnel and the general public on matters pertaining to water bill accounts; preparing, checking and reviewing a variety of records and reports relative to water bill collection activities.

EXAMPLES OF DUTIES:

1. Assists in planning, organizing and supervising the work of division employees; assists in supervising the processing of water bills for delivery to consumers.
2. Assists in supervising the screening of past-due bills and the preparation and mailing of delinquent notices and collection letters.
3. Reviews delinquent accounts relative to the extension and/or restriction of credit.
4. Assists in supervising, processing and banking of all payments of water services.
5. Assists in supervising and personally participates in the preparation of reports and statistical information and letters in connection with collection division activities.
6. Conducts correspondence and personal interviews in connection with complaints on water service or billing matters.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of high school, supplemented by at least seven years of progressively responsible clerical and administrative experience, including experience in the billing, collection and handling of large sums of money, including three years of responsible supervisory experience; or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Requires considerable knowledge of: the rules and regulations governing the collection of water bills; the development and maintenance of billing systems and records; the principles and practices of business and office management.

Requires ability to: plan, assign, supervise and inspect the work of subordinate personnel; deal courteously and effectively with the public in dealing with customers' requests for service and with complaints.

PROMOTIVE LINES:

To: Collection Supervisor, Water Department

From: Cashier, Water Department



**CITY AND COUNTY OF SAN FRANCISCO
DEPARTMENT OF HUMAN RESOURCES**

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4366 Collection Supervisor

Definition:

Under general direction, supervises and monitors the collection and accounting of revenues due the City and County; is responsible for training employees; reviewing various accounts; reviewing changes in laws and regulations; interpreting policies and legal requirements; meeting and corresponding with clients to explain collection rules, regulations and procedures and to obtain revenues owed the City; maintaining liaison and coordinating work with federal and state and City representatives; and directing and reviewing a variety of information, reports and data pertaining to collection activities.

Distinguishing Features:

The Collection Supervisor is distinguished from the next lower code of Senior Collection Officer in that the latter performs difficult and responsible collection work which may include lead worker responsibilities.

Supervision Exercised:

Positions in this class are first-line supervisors responsible for supervising staff involved in reviewing overdue accounts and making contact with debtors by letter, telephone or in person to collect the payment of delinquent monies.

Examples of Important and Essential Duties:

According to Civil Service commission Rule 9, the duties specified below are representative of the range of duties assigned to this job code, and are not intended to be an inclusive list.

1. Plans, directs and supervises the work of the Collection Section; assigns and reviews the work of subordinates engaged in revenue collections and the negotiation of reimbursement agreements; monitors and evaluates performance of staff; assists with problems and recommends methods to increase efficiency of collection efforts.

2. Trains employees in collection techniques, evaluation of information obtained and financial procedures; interprets policies and legal requirements.

3. Makes continuous reviews of all accounts; screens past-due bills and directs the preparation and mailing of delinquent notices and collection letters; personally initiates actions to enforce payment of delinquent bills.

4. Meets and corresponds with clients in explaining collection rules, regulations and procedures and in answering complaints on services and billing matters, recommends settlement and/or further action required for all delinquent accounts.

5. Maintains liaison and coordinates work with the City Attorney, District Attorney, and Federal and State representatives; reviews changes in laws and regulations affecting collections; may personally handle difficult cases, negotiate difficult repayment agreements and represent the department in small claims court; reviews uncollectable accounts to determine the proper course of action.

6. Directs the preparation and review of a variety of reports and statistical data and information pertaining to collection activities.

7. May inspect the operation of billing and collection functions; directs the application and processing of all funds collected.

8. May process credit applications with recommendations of approval or disapproval.

9. Performs related duties and responsibilities as assigned.

Job Related and Essential Qualifications:

Knowledge of: The laws, rules and regulations governing the collection of delinquent accounts; the methods and techniques used in collection work; the development and maintenance of billing systems and records; office and business management techniques and procedures.

Ability to: Plan, direct and supervise the work of others, deal effectively and tactfully with the general public, exercise sound judgement in evaluating situations and making decisions, interpret the legal requirements involved in collection work, prepare clear and concise reports' and correspondence.

Experience and Training Guidelines:

1. Three years (1 year=2000 hours) of verifiable experience supervising employees engaged in the collection of accounts, including the collection of delinquent accounts as a major function;

OR

2. A. Possession of a baccalaureate degree from an accredited college or university with major coursework in Business Administration or Accounting

AND

B. One year of verifiable experience supervising employees engaged in the collection of accounts, including the collection of delinquent accounts as a major function;

OR

3. Four years of experience in class 4306 Collections Officer*

OR

4. Two years of experience in class 4308 senior Collections Officer;

OR

5. Six months' experience in class 4366 Collections Supervisor;

OR

***SUBSTITUTION:**

Possession of a baccalaureate degree from an accredited college or university with major coursework in Business Administration or Accounting may be substituted for up to one year of experience as a 4306 Collections Officer.

Special Requirements:

Essential duties require the following physical skills and work environment; ability to work in a standard office environment, which may involve prolonged sitting, bending and operation of typing, word processing and other office equipment; interact with and obtain information from hostile individuals.

Effective Date: 9/25/98

Amended Date: 7/23/99

Reason for Amendment:

To accurately reflect the current tasks, knowledge, skills and abilities defined in the most recent job analysis conducted for this job code.

SAN FRANCISCO CIVIL SERVICE COMMISSION

DOCUMENTS DEPT.

CLASS TITLE: DIRECTOR, BUREAU OF DELINQUENT REVENUE

CODE: 4368

OCT 19 1987

CHARACTERISTICS OF THE CLASS:

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Under direction, plans, organizes and directs the activities of the Bureau of Delinquent Revenue of the Tax Collector's Office; establishes enforcement policies and procedures, and manages the collection of delinquent account receivables for City and County departments; advises City departments on problems relating to revenue collection; develops and implements collection management systems and procedures; and performs related duties as required.

DISTINGUISHING FEATURES:

This single position classification manages the Bureau of Delinquent Revenue of the Tax Collector's Office and reports to the Deputy Tax Administrator. The incumbent is responsible for directing the day-to-day activities of the Bureau which provides collections enforcement and related fiscal management services for charges due or owing for City and County services city-wide. This class is distinguished from Collection Supervisor in that the latter supervises the collection function in one department or assists the Director in supervising the Bureau of Delinquent Revenue in the Tax Collector's Office.

EXAMPLES OF DUTIES:

"The class specification shall be descriptive of the class and shall not be considered as a restriction on the assignment of duties not specifically listed." (CSC Rule 7)

1. Plans, organizes and directs the activities of the Bureau in performing the collection of delinquent accounts; prepares and administers the Bureau's budget.
2. Recommends and implements centralized collections policies, plans and procedures to carry out the collection function.
3. Maintains liaison and assists other departments in matters relative to revenue collections and enforcement procedures.
4. Establishes collection priorities and sets standards for review of delinquent accounts.
5. Assists Data Processing staff in planning and developing computer based systems for collection management.
6. Directs the preparation and review of a variety of reports and statistical data pertaining to collection activities.
7. Assigns, reviews and evaluates the performance of staff in the Bureau; trains and develops employees in collection techniques, evaluation of information obtained and financial procedures.
8. Determines Business and Payroll Expense Tax liability based on information supplied by escrow holders or taxpayers in order to submit demands to escrows before the transfer of business assets are completed; audit and review of accounting records may be required in order to make the proper determination.
9. Keeps abreast of judicial and legislative changes in the law related to collection activities and develops plans for the implementation of regulatory and legislative changes.
10. Represents the Department in collections matters.

QUALIFICATIONS:

"The examination announcement shall provide the qualifications...and other particulars... Applicants must be guided solely by the announcement of the examination for which they apply." (CSC Rule 9)

Knowledge, Abilities and Skills: Comprehensive knowledge of: the laws, rules and regulations governing the collection of delinquent accounts; standard legal procedures used in collection matters, enforcement of judgment, property transactions, probate and tax law.

Thorough knowledge of: general accounting and auditing principles and procedures.

Some knowledge of: electronic data processing systems as used in the administration of collection programs.

Ability to: Plan, direct and supervise the work of others; analyze data and situations, draw logical conclusions and initiate effective courses of actions; establish and maintain cooperative and effective working relationships with other departments; interpret and apply legal and administrative procedures and policies to the collection of delinquent accounts; prepare comprehensive, clear and concise reports; communicate effectively orally.

ADOPTED: 9/21/87

#2041m

(AMENDED)

CLASS TITLE: CASHIER, TAX COLLECTOR

CODE: 4372

CHARACTERISTICS OF THE CLASS:

Under general direction, supervises the receipt, recording and deposit of money from a wide variety of sources in the Tax Collector's office; performs responsible cashiering work in connection therewith; and performs related duties as required.

Requires responsibility for: Interpreting, carrying out and enforcing existing methods and procedures relative to the receipt and handling of funds; achieving considerable economies through the accurate handling of large amounts of money; making regular contacts with the general public, other departmental personnel and outside organizations in connection with the receipt and handling of large amounts of money; checking and reviewing important financial and operating reports relative to the collection and disbursement of funds.

EXAMPLES OF DUTIES:

1. Plans, assigns, organizes and supervises subordinate personnel involved in collecting or receiving payments for real estate and personal property taxes, licenses, delinquent revenue collections, parking meter collections, purchase and use tax, sales tax collections, and business and hotel transient occupancy taxes.
2. Maintains and supervises the maintenance of related records for departmental revolving funds and checking accounts.
3. Inspects and reviews work of subordinate employees to assure conformance to instructions and standard procedures in the Tax Collector's office.
4. Conducts correspondence with taxpayers in connection with shortages, bad checks, over payment, and provides information on the payment of taxes.
5. Coordinates collection activities with other departmental personnel in compiling monthly statements of revenue and balancing of tax rolls.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of high school, supplemented by at least six years of progressively responsible experience in the receipt and disbursement of large sums of money, including at least two years of responsible supervisory experience; or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Requires considerable knowledge of: The methods and procedures of handling and accounting for large sums of money; the laws, regulations and ordinances applied to the collection and disbursement of City funds, particularly as applied to the Tax Collector's office; the general municipal financial operations; modern accounting principles and practices.

Requires considerable ability to: Perform arithmetical calculations quickly and accurately; deal effectively and courteously with the general public; plan, organize and inspect the work of subordinate personnel; detect counterfeit money and bad checks; prepare and maintain financial reports and records relating to collections and disbursements.

PROMOTIVE LINES:

To : 1133 Tax Collector or Registrar of Voters

From: 1634 Principal Account Clerk
4316 Head Property Tax Clerk

AMENDED: March 24, 1969

CLASS TITLE: DEPUTY TAX ADMINISTRATOR

CODE: 4373

CHARACTERISTICS OF THE CLASS:

Under general administrative direction, is responsible for directing the auditing activities for tax collection purposes in the office of the Tax Administrator and serves as the chief assistant to the Tax Administrator in supervising all the activities and duties of the Tax Collector's office; acts for the Tax Administrator in his absence; and performs related duties as required.

Requires responsibility for: Originating, developing, coordinating and executing policies and methods for the Tax Collector's office; making regular contacts with the public, professional and legal personnel, department heads, governmental agencies and representatives of organizations and groups involving discussion, explanation and interpretation of policies, rules and regulations concerning the collection of taxes, delinquent revenues and business licensing taxes; requires overall supervisory responsibility for the preparation, direction, maintenance and filing of important tax collection records and reports as prescribed by State and local laws.

EXAMPLES OF DUTIES:

1. Supervises, consults with and coordinates the activities of all operating divisions of the Tax Collector's office; supervises the collection of taxes on real estate, tangible and intangible personal property and licenses and the collection of business and hotel transient occupancy taxes; issues receipts or licenses for same; accounts to the State and local Controller for taxes collected; answers inquiries pertaining to taxes; issues annual delinquent tax list for publication.
2. Assists in the interpretation of State and local laws, rules and regulations of the City and State Controller pertaining to the collection of personal and real property taxes, municipal license taxes, business and hotel transient occupancy taxes; reviews and resolves tax problems and disagreements with the general public and representatives of various organizations.
3. Supervises the preparation of an annual list of property on which taxes have become delinquent for submission to the State Controller; deeds delinquent property to the State; supervises the conduct of public auctions of tax deeded real properties; maintains licensing lists and keeps general operational records.
4. Supervises the collection of delinquent revenues such as unsecured personal property taxes, licenses, rents, damages to City property, amounts due the City for hospital care and all other sums owed the City; deposits and accounts for the collection.
5. Supervises the collection of occupational, business, professional and other license taxes imposed by ordinance of the Board of Supervisors; maintains necessary records; makes accounting and settlement of such collections.
6. Supervises the preparation of departmental budget and work program.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires the completion of a four-year college or university, with a baccalaureate degree, with major course work in public administration, business administration, law, economics or accounting.

Requires four years of progressively responsible experience in a governmental agency involving supervision of a complex and diversified clerical or accounting operation; or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Requires considerable knowledge of: The principles and practices of the activities of the Tax Collector's office; taxation laws relating to real and personal property, delinquent revenues, licensing taxes and business and hotel transient occupancy taxes; modern office methods and procedures.

CLASS TITLE: DEPUTY TAX ADMINISTRATOR

CODE: 4373

MINIMUM QUALIFICATIONS: (contd)

Requires ability to: Analyze departmental procedures, methods and forms and institute revisions as needed; interpret and explain laws and policies relating to collection of taxes, business licensing and collection of delinquent revenues; establish and maintain effective working relations with employees or governmental agencies, legal and professional personnel and the general public.

PROMOTIVE LINES:

To : 4374 Tax Administrator

Amended: 7/15/74

(Retitled, Renumbered & Amended)

(Abolishes class 4376 Chief Assistant Tax Collector)

(NEW CLASS)

CLASS TITLE: TAX ADMINISTRATOR

CODE: 4374

CHARACTERISTICS OF THE CLASS:

Subject to administrative approval, plans, organizes and directs the collection and administration of real and personal property taxes, business taxes, including gross receipts and payroll expense taxes, parking taxes, utility users taxes and other municipal and county taxes; develops and recommends new sources of municipal and county income; accounts for taxes collected; enforces the collection of delinquent revenues; and performs other related duties as required.

Requires major responsibility for: Developing, coordinating, originating and executing policies and methods for the efficient conduct of the Tax Collector's office; continuing personal contacts with the public, including commercial and industrial representatives, professional and legal personnel, department heads, governmental agencies and representatives of organizations and groups involving planning discussion, explanation and interpretation of policies, drafting of rules and regulations concerning the collection of real and personal property taxes, delinquent revenues, licenses and business taxes; directing, preparing, compiling, maintaining and filing important tax collection records and reports as prescribed by state and local law.

EXAMPLES OF DUTIES:

1. Administers state and local laws relating to the collection of municipal and county taxes; interprets and directs the enforcement of legal provisions in the collection of taxes; develops and directs through subordinates, new methods for the enforcement of tax laws.

2. Administers the payroll expense and gross receipts taxes, the parking tax, utility users tax, stadium operator's admission tax, and hotel tax; establishes Tax Collector's Rulings; prepares bulletins and pamphlets containing information on these several taxes; conducts industry-wide conferences; holds hearings on taxpayer's petitions; initiates and recommends amendments and ordinances and appears before the Board of Review to defend actions taken relative to taxpayers.

3. Directs the collection of taxes on real estate, personal property; directs the issuance of all municipal licenses; directs the collection of all parking meter revenues; plans and directs a system of accounting to the state and to the City Controller for taxes collected; directs the preparation of answers to inquiries regarding taxes; directs the preparation of delinquent tax list for publication.

4. Directs the investigation and collection of delinquent revenues such as escaped business taxes, unsecured personal property taxes, licenses, rents, damages to city property, amounts due the city for hospital care and all other sums owed the city; deposits and accounts for the collection.

5. Directs the preparation of an annual list of property on which taxes have become delinquent for submission to the State Controller; deeds delinquent property to the state; maintains licensing lists and keeps general operational records.

6. Performs the duties of Redemption Officer of the City and County of San Francisco in preparing redemption records, including abstract lists, extended rolls, and delinquent rolls; indexes and maintains other records needed in the performance of these duties; maintains records of tax-deeded and tax-sold properties; establishes payment plans for redeeming tax-sold properties and performs other duties related to the office of Redemption Officer.

7. Conducts program research into new methods of obtaining city and county revenues; develops methods and procedures necessary to implement the collection of such revenues; appears before legislative bodies and meets with responsible persons in city and state government with respect to the development of new revenue sources.

(more)

CLASS TITLE: TAX ADMINISTRATOR

CODE: 4374

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of a four year college or university, with a baccalaureate degree, with major course work in law, public or business administration.

Requires eight years of progressively responsible experience in a governmental agency involving supervision of a complex and diversified clerical or accounting operation; or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Requires considerable knowledge of: The principles and practices of office management and modern office methods and procedures; taxation laws relating to real and personal property, delinquent revenues and business licensing taxes; governmental accounting and administration.

Requires ability to: Administer a county office performing responsible clerical and accounting work; analyze departmental procedures, methods and forms and institute revisions as needed; interpret and explain laws and policies relating to collection of real and personal property taxes, business taxes, issuance of licenses and collection of delinquent revenues; establish and maintain effective working relations with governmental agencies, legal and professional personnel and the public in general.

PROMOTIVE LINES:

To : No normal lines of promotion

From: 4376 Chief Assistant Tax Collector
4226 Chief Personal Property Auditor
4225 Assistant Chief Personal Property Auditor
4224 Principal Personal Property Auditor
1131 Assistant Bureau Chief, Finance and Records

ADOPTED: 9/11/72

(Abolishes class 1133 Tax Collector or Registrar of Voters)

(RETITLED & AMENDED)

CLASS TITLE: CHIEF ASSISTANT TAX COLLECTOR

CODE: 4376

CHARACTERISTICS OF THE CLASS:

Under general administrative direction, serves as principal assistant to the Tax Collector in supervising all the activities and duties of the Tax Collector's office; acts for the Tax Collector in his absence and performs related duties as required.

Requires responsibility for: Originating, developing, coordinating and executing policies and methods for the Tax Collector's office; making regular contacts with the public, professional and legal personnel, department heads, governmental agencies and representatives of organizations and groups, involving discussion, explanation and interpretation of policies, rules and regulations concerning the collection of taxes, delinquent revenues and business licensing taxes; requires overall supervisory responsibility for the preparation, direction, maintenance and filing of important tax collection records and reports as prescribed by State and local laws.

EXAMPLES OF DUTIES:

1. Supervises the collection of taxes on real estate, tangible and intangible personal property and licenses and the collection of business and hotel transient occupancy taxes; issues receipts or licenses for same; accounts to the state and local Controller for taxes collected; answers inquiries pertaining to taxes; issues annual delinquent tax list for publication.
2. Assists in the interpretation of state and local laws, rules and regulations of the city and state Controller pertaining to the collection of personal and real property taxes, municipal license taxes, business and hotel transient occupancy taxes; reviews and resolves tax problems and disagreements with the general public and representatives of various organizations.
3. Supervises the preparation of an annual list of property on which taxes have become delinquent for submission to the state Controller; deeds delinquent property to the state; supervises the conduct of public auctions of tax deeded real properties; maintains licensing lists and keeps general operational records.
4. Supervises the collection of delinquent revenues such as unsecured personal property taxes, licenses, rents, damages to city property, amounts due the city for hospital care and all other sums owed the city; deposits and accounts for the collection.
5. Supervises the collection of occupational, business, professional and other license taxes imposed by ordinance of the Board of Supervisors; maintains necessary records; makes accounting and settlement of such collections.
6. Supervises the preparation of departmental budget and work program.

MINIMUM QUALIFICATIONS:

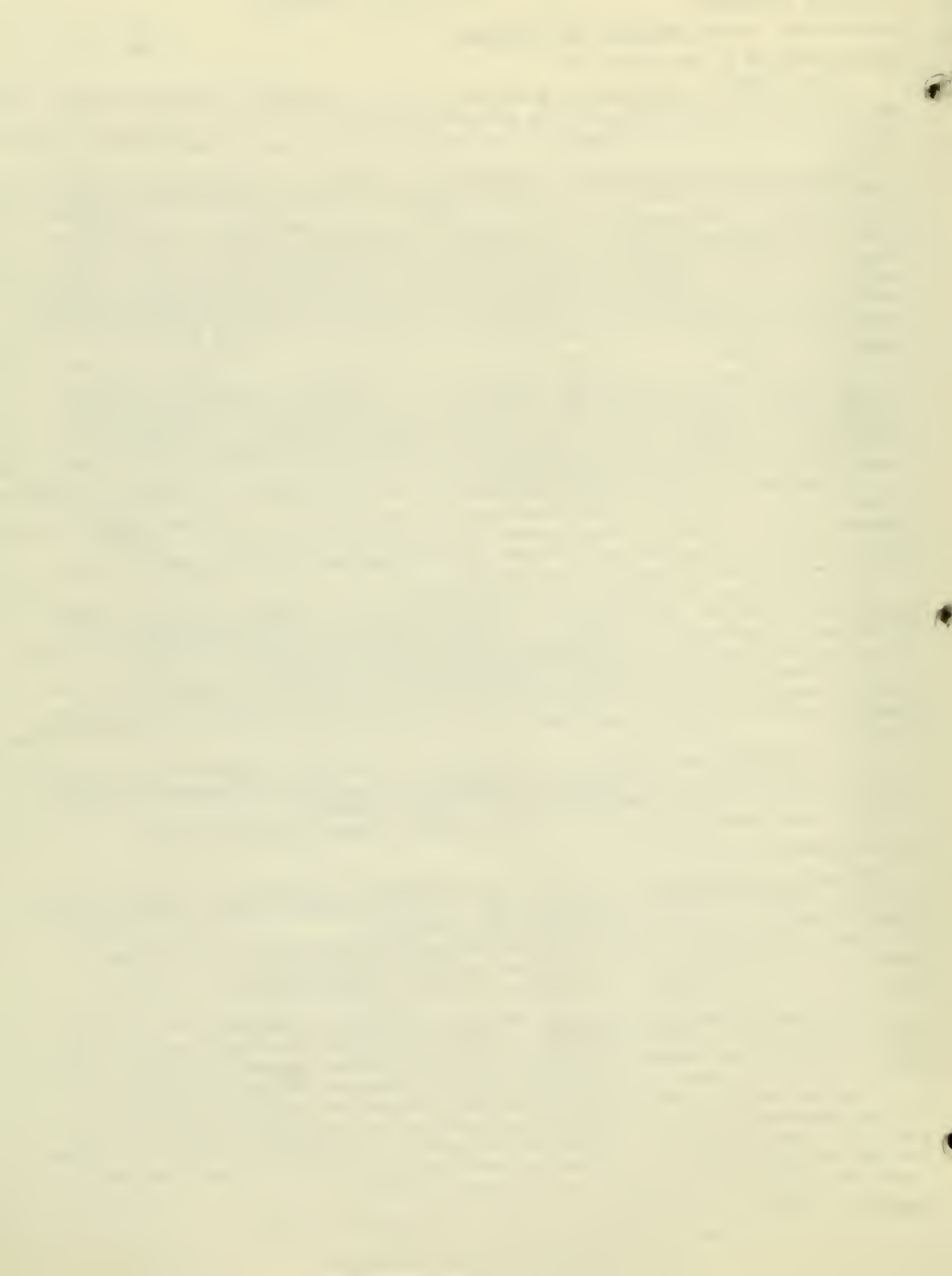
Training and Experience: Requires the completion of a four-year college or university, with a baccalaureate degree, with major course work in public administration, business administration, law, economics or accounting.

Requires four years of progressively responsible experience in a governmental agency involving supervision of a complex and diversified clerical or accounting operation; or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Requires considerable knowledge of: The principles and practices of the activities of the Tax Collector's office; taxation laws relating to real and personal property, delinquent revenues, licensing taxes and business and hotel transient occupancy taxes; modern office methods and procedures.

Requires ability to: Analyze departmental procedures, methods and forms and institute revisions as needed; interpret and explain laws and policies relating to collection of taxes, business licensing and collection of delinquent revenues; establish and maintain effective working relations with employees or governmental agencies, legal and professional personnel and the general public.

PROMOTIVE LINES: To: : 1133 Tax Collector or Registrar of Voters
 From: 4338 License Bureau Supervisor
 4348 Delinquent Revenue Supervisor
 4372 Cashier, Tax Collector



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SAN FRANCISCO CIVIL SERVICE COMMISSION

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CLASS TITLE: ASSISTANT CASH MANAGEMENT & INVESTMENT OFFICER

CODE: 4377

CHARACTERISTICS OF THE CLASS:

Under direction, analyzes cash flow throughout City and County departments and develops a cash flow system; initiates and modifies cash flow procedures to accelerate the availability of cash for investment purposes; establishes and maintains relationships with representatives of banks and financial institutions; advises departmental personnel City-wide regarding cash management procedures and policies; assists the Cash Management & Investment Officer in administering policies; and performs related duties as required.

DISTINGUISHING FEATURES:

This single-position classification assists the Cash Management & Investment Officer in all aspects of cash management and investment policy and develops and implements procedures for the analysis and acceleration of cash flow in order to maximize the amount of funds available for investment. The incumbent acts as liaison to representatives of banks and financial institutions concerning cash management and related matters. The class is distinguished from the Cash Management & Investment Officer in that the latter has overall responsibility for the cash management and investment function of the City and County Treasury and directs the program under broad policy guidance of the Treasurer.

EXAMPLES OF DUTIES:

"The class specification shall be descriptive of the class and shall not be considered as a restriction on the assignment of duties not specifically listed." (CSC Rule 7)

1. Reviews the cash receipts and disbursements of all major revenue departments of the City and County; reviews, analyzes and makes recommendations regarding the establishment and modification of a computerized cash flow system.

2. Develops methods and procedures to maximize balances of funds available for investment and maintains sufficient bank balances to satisfy disbursements and soft-dollar requirements.

3. Monitors and analyzes departmental cash handling procedures and policies; makes recommendations and advises departmental management on the development and maintenance of effective and productive cash management systems and procedures.

4. Establishes and maintains banking relationships; monitors accounts and financial statements; reviews and analyzes accounts and prepares requests for proposals when new banking services are required or may be advantageous.

5. Reviews financial records with auditors and responds to questions regarding data.

6. Prepares statistical reports projecting probable future activity of funds.

7. Assists the Cash Management and Investment Officer in administering cash management and investment policies, and acts on behalf of the Officer in case of absence.

QUALIFICATIONS:

"The examination announcement shall provide the qualifications...and other particulars... Applicants must be guided solely by the announcement of the examination for which they apply." (CSC Rule 9)

Knowledge, Abilities and Skills: Thorough knowledge of: treasury cash management and investment of treasury funds; cash flow in a large organization; financial accounting and banking procedures.

Working knowledge of: municipal budgetary process particularly in the area of the various departmental influences on cash flow and their relationship to municipal government.

Ability to: exercise sound judgment in the handling of large sums of money; develop and maintain cash flow procedures and reporting systems; maintain good working relationships with other departmental and financial institution personnel.

ADOPTED: 9/21/87

2042m

SAN FRANCISCO CIVIL SERVICE COMMISSION

CLASS TITLE: CASH MANAGEMENT AND INVESTMENT OFFICER

CODE: 4378

CHARACTERISTICS OF THE CLASS:

Under general administrative direction, plans, directs and executes the cash management program in the Treasurer's Office; operates a computer system to monitor the portfolio and the City's cash flow; analyzes the money markets and processes contracts for the deposit of funds; makes recommendations on investments and bank deposits in order to maximize interest income and to minimize the amount of non-interest bearing money; prepares investment reports including cash flow and interest projections; and performs related duties as required.

DISTINGUISHING FEATURES:

This is a one position class with the incumbent reporting directly to the City and County Treasurer. The employee receives broad policy guidance from the Treasurer and then is responsible for organizing and carrying out all technical features of the work with a high degree of independence. There are frequent contacts with bankers, brokers and others in the financial and investment field. Since there is an approximate average balance of 500 million dollars in City funds in the Treasurer's Office, the consequences of the investment decisions by this employee are important and effect large sums of possible interest income.

EXAMPLES OF DUTIES:

1. Administers the computerized cash management program of the Treasurer; analyzes the Tele Rate news monitoring service of the money market; utilizes the Money Max computer to maintain the portfolio, review the cash flow, obtain investment reports and provide comparative trading data.
2. Reviews daily the current receipts and disbursements in comparison with cash flow projections.
3. Adjusting the investment portfolio to reflect the tax charges and assumptions in relation to daily, monthly and seasonal receipts.
4. Reorganizes current data to reflect historical criteria for guides to anticipated flow.
5. Schedules purchase of U.S. Treasuries, Government Agencies, banker's acceptances, repurchase agreements and other legal investments under the state code; estimates amounts of money which may be invested on a long or short term basis; and swaps and trades securities when advantageous to the improvement of yield and or principal.
6. Keeps daily balances of Treasurer's active and inactive accounts and interest revenue; maintains liaison with the Mayor, Board of Supervisors and Controller's offices regarding estimates of interest revenue for the current fiscal year as well as forecasting revenue for future years.

CLASS TITLE: CASH MANAGEMENT AND INVESTMENT OFFICER

CODE: 4378

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of a four-year college or university with a baccalaureate degree.

Requires four years of progressively responsible experience with short term portfolio management in excess of \$100,000,000.

Knowledge, Abilities and Skills: Requires a considerable knowledge of treasury cash management and investment of treasury funds; a thorough knowledge of cash flow in a large organization; a thorough knowledge of financial accounting and banking procedures; a working knowledge of the budgetary process of a chartered city, particularly in the area of the various departmental influences on cash flow and their relationship to the authority of the committees of the Board of Supervisors.

Requires considerable ability to: Exercise independent judgment in the handling of large sums of money; develop and maintain cash flow procedures and reporting systems; maintain good working relationships with money market house personnel.

PROMOTIVE LINES:

TO: To be determined

FROM: Original entrance examination

ADOPTED: 2/7/77

(Abolishes class 4330 Investment Specialist)

CLASS TITLE: CASHIER, TREASURER

CODE: 4380

CHARACTERISTICS OF THE CLASS:

Under general supervision, collects and disburses large sums of money in the treasurer's office; prepares and maintains records and accounts for monies handled; and performs related duties as required.

Requires responsibility for: achieving considerable economies through the proper handling of large amounts of money; dealing effectively and courteously with other departmental employees and the general public on matters pertaining to the operation of the treasurer's office; the maintenance of records reflecting the receipt and deposit of monies.

EXAMPLES OF DUTIES:

1. Pays out of the treasurer's cash account, against authorized demands, large amounts of money for jury fees, welfare and miscellaneous payments and the cashing of warrants.
2. Receives and counts large sums of money from the various city departments and examines all checks and warrants for accuracy according to the negotiable instruments laws.
3. Checks currency received for counterfeit bills; receives warrants from clearing houses and sorts into proper order of accounts by controller's numbers.
4. Balances warrants returned from individual banks with warrants received from the clearing house for proper payment to the clearing house.
5. Keeps daily balance sheets of all money paid out and assures that disbursements are accurately posted to the treasurer's daily cash account.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of high school, supplemented by at least three years of experience in the handling of large amounts of money in a bank or similar institution; or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Requires good knowledge of: checks, bonds and other negotiable instruments and their proper validation and endorsements; the techniques of handling large amounts of money and accounting for cash receipts and disbursements.

Requires ability to: make rapid and accurate arithmetical calculations; handle large amounts of cash, checks and warrants with accuracy; maintain records of cash transactions.

PROMOTIVE LINES:

To: Senior Cashier, Treasurer

From: Teller

SAN FRANCISCO CIVIL SERVICE COMMISSION

CLASS TITLE: SENIOR CASHIER, TREASURER

CODE: 4382

CHARACTERISTICS OF THE CLASS:

Under direction, is responsible for supervising the receipt and disbursement of and accounting for all money paid into and disbursed by the city treasurer's office; personally receives and disburses large amounts of money; and performs related duties as required.

Requires responsibility for: explaining and carrying out existing methods and procedures relating to the receipt and disbursement of and accounting for city funds; achieving considerable economies in the careful handling of large amounts of money; making contacts with departmental personnel and the general public in connection with receipt and disbursement of funds.

EXAMPLES OF DUTIES:

1. Receives all deposits made in the treasurer's office, checks money for counterfeit bills and audits deposit sheets for accuracy of computations and allocations to proper funds.
2. Supervises the balancing of amounts paid individual banks for city warrants cashed by such banks; assures such warrants are charged against appropriate funds and sorted according to controller's number order.
3. Prepares daily cash balances and bank deposits.
4. Supplies cashiers with money for daily operations and assures that sufficient cash is on hand for normal operations.
5. Checks daily cash balances of the receiving and paying cashiers.
6. Receives collateral and bonds for banks and records withdrawals and exchanges of same.
7. Receives treasury bonds put up for bail and surrenders same to bail bond brokers upon proper demand.
8. Accepts delivery of investment bonds purchased by the retirement system and maintains an inventory of all securities belonging to the retirement systems.
9. May be authorized to sign checks in the absence of the city treasurer for unlimited amounts of city monies.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of high school, supplemented by at least five years of progressively responsible experience in the handling and accounting of large sums of money in banks or similar institutions, including one year of supervisory experience; or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Requires considerable knowledge of: standard banking procedures involved in handling checks and related processes; checks, bonds and other common negotiable instruments and their proper endorsement; the methods of balancing checks and cash against records of their receipt.

CLASS TITLE: SENIOR CASHIER, TREASURER
(continued)

CODE: 4382

Requires considerable ability to: make rapid and accurate arithmetical computations; handle and account for large amounts of cash and negotiable instruments; maintain records of cash transactions.

PROMOTIVE LINES:

To: Chief Assistant Treasurer

From: Cashier, Treasurer
Assistant Cashier, Tax Collector

SAN FRANCISCO CIVIL SERVICE COMMISSION

CLASS TITLE: CHIEF ASSISTANT TREASURER

CODE: 4384

CHARACTERISTICS OF THE CLASS:

Subject to administrative approval, serves as assistant to the city treasurer in administering all activities and functions of the treasurer's office; and performs related duties as required.

Requires major responsibility for: coordinating, interpreting and assisting in the development of policies and procedures relative to the operation of the treasurer's office; achieving considerable economies and/or preventing considerable losses through the proper handling of and accounting for large sums of money; making regular responsible contacts with other departmental personnel, financial institutions and the general public in connection with departmental operations; directing the preparation and maintenance of important financial records and reports relating to the operations of the treasurer's office.

EXAMPLES OF DUTIES:

1. Assists in controlling the receipts and disbursement of all city and county funds.
2. Supervises and participates in transactions with financial institutions including deposits, withdrawals, processing and signing of city bonds and the examination of collateral pledged as security for deposits; assists in the investment of city and county funds.
3. Keeps informed on the security market and financial factors which affect such investments.
4. Assists in directing the collection of inheritance taxes.

MINIMUM QUALIFICATIONS:

Training and Experience: Requires completion of a four year college or university, with a baccalaureate degree, with major course work in accounting, finance or a closely related field.

Requires at least eight years of progressively responsible experience in the handling and accounting for large sums of money, including four years of responsible supervisory experience; or an equivalent combination of training and experience.

Knowledge, Abilities and Skills: Requires considerable knowledge of: existing charter provisions, laws and ordinances relating to the operations of the treasurer's office; financial and banking methods and procedures relative to the processing and deposit of large sums of money and municipal bonds.

Requires considerable ability to: plan, assign and direct the activities of subordinate personnel; maintain good working relationships with banking officials, outside agencies and other departmental officials; handle and account for large sums of money and negotiable instruments.

PROMOTIVE LINES:

No normal lines of promotion - position exempt from examination.

SAN FRANCISCO CIVIL SERVICE COMMISSION

CLASS TITLE: TREASURER

CODE: 4390

CHARACTERISTICS OF THE CLASS:

As an elected official responsible to the electorate, and subject to executive approval and the legislative body with respect to budgets, purchasing and other functions and activities, serves as treasurer for the city and county; directs all functions of the treasurer's office in accordance with existing charter provisions and the general laws of the state; and performs related duties as required.

Requires major responsibility for: coordinating, approving and executing all policies and procedures relating to the operations of the treasurer's office; achieving economies and/or preventing major losses through the direction of the proper handling and processing of large amounts of money and negotiable securities; making regular important contacts with responsible officials, governmental agencies and outside organizations relative to the responsibility of the office; directing the preparation and maintenance of detailed and important financial records and reports related to office operations.

EXAMPLES OF DUTIES:

1. Plans, assigns, directs and reviews all functions and operations of the treasurer's office.
2. As county treasurer, is responsible for acting as the authorized representative of the state controller in connection with the administration of the inheritance tax act.
3. Serves as joint custodian of all monies or bonds belonging to the retirement system; is responsible for the custody of all bonds pledged by banks for collateral for deposit of public funds.
4. Has custody of all trust funds; has overall responsibility for the safekeeping of all public funds.

NOTE: As this position is an elective office of the city and county, no minimum qualifications and lines of promotion are included in this specification.

